Short Drama App

Global Advertising Trends

2024.01.01 – 2024.02.24

AppGrowing

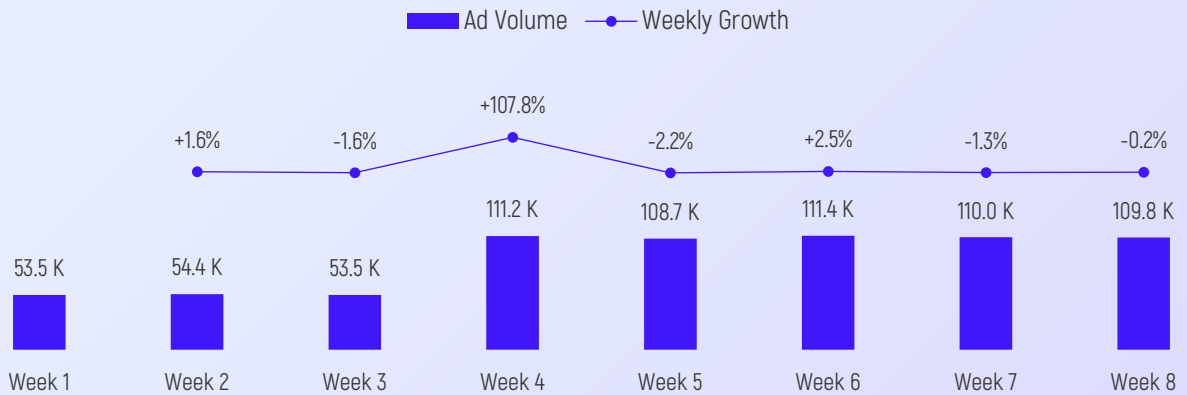# Key Findings & Conclusions

- Some launched short drama Apps raised their ad spending around week 4 of January, resulting in a more competitive intensity in the category.

- The target markets of short drama Apps are concentrated in English-speaking countries and Southeast Asia. This may be the result of a comprehensive consideration of user base and commercial benefits.

- Short drama app's primary target profile is women aged 25-44.

- The main creative form is the vertical video of more than 60 seconds. The content is generally based on in-app drama resources.

- Minor language content is appearing in headlines and newly released apps. It shows that short drama has experienced rapid growth and is about to start a battle for minor language markets.

- With users demanding higher quality episodes, translated dramas are gradually being replaced by local ones.

- Localized themes, emotional content and visual stimulation are at the core of ad creative design.
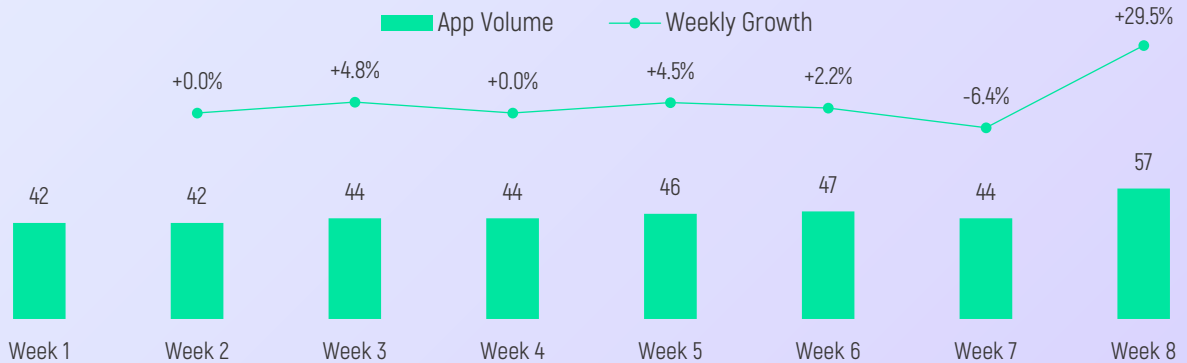
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Advertising Trends

The global **ad volume for short drama Apps rose significantly in Week 4 (0121-0127) of January** and remained so for several weeks. However, there was **no notable increase in advertised short drama App volume** during the period.

It means that the increase in ad volume may not be coming from new competitors. Some of the launched apps have boosted their ad spend.

Ad Volume Trend

Ad Volume — Weekly Growth

	+1.6%	-1.6%	+107.8%	-2.2%	+2.5%	-1.3%	-0.2%
			111.2 K	108.7 K	111.4 K	110.0 K	109.8 K
53.5 K	54.4 K	53.5 K					
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8

App Volume Trend

App Volume — Weekly Growth

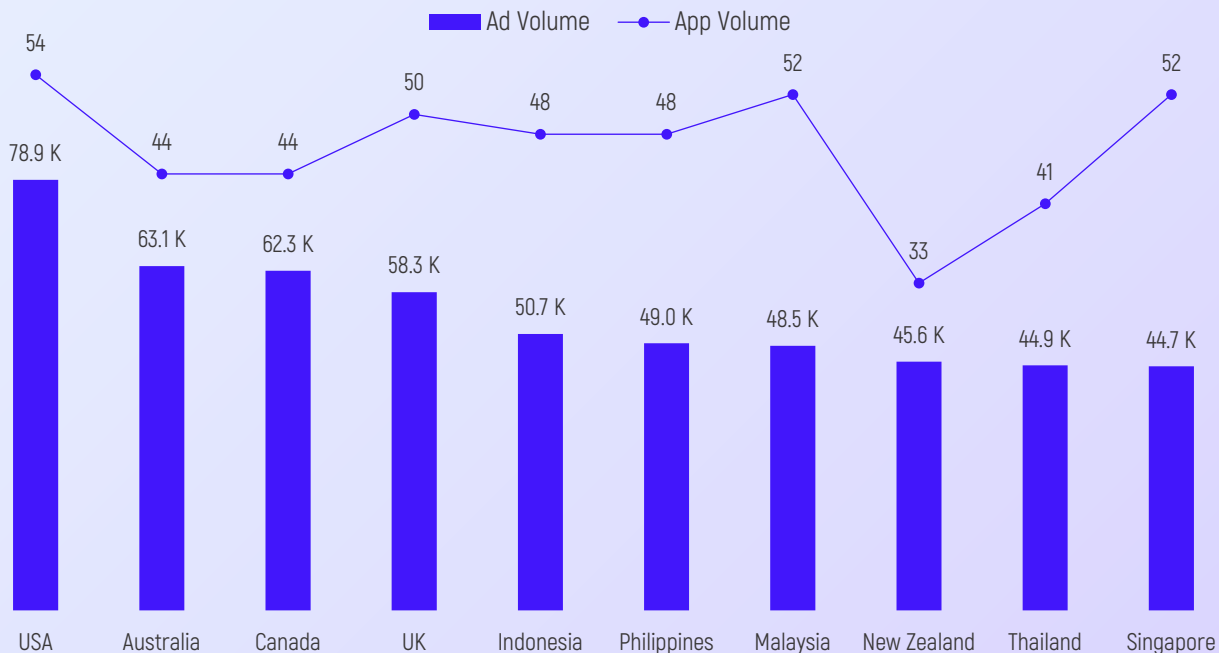| +0.0%	+4.8%	+0.0%	+4.5%	+2.2%	-6.4%	+29.5%
42	42	44	44	46	47	44	57
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8

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Main Markets

The main markets for short drama Apps are currently focused on English-speaking countries. Users in these regions are usually more accustomed to paying for content, which is a guarantee of App revenue.

Most of the markets ranking in the latter top 10 are Southeast Asian regions, such as Indonesia, Philippines, Malaysia, and other markets with large population bases. The huge amount of users in these regions laid the foundation for hybrid monetization while guaranteeing DAU.

Ad Volume & App Volume in Main Markets

Legend: Ad Volume | App Volume

Market	Ad Volume	App Volume
USA	78.9 K	54
Australia	63.1 K	44
Canada	62.3 K	44
UK	58.3 K	50
Indonesia	50.7 K	48
Philippines	49.0 K	48
Malaysia	48.5 K	52
New Zealand	45.6 K	33
Thailand	44.9 K	41
Singapore	44.7 K	52

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Audience Analysis (Europe Only)

The audience of ads for short drama Apps is mainly female. 39.7% of the ads target only women, and 47.2% of the ads feature a majority female audience. This suggests that female users may be more likely to pay for such content, thus becoming the main target for competition. In addition, in terms of age, 87.5% of ads are targeted at users aged 25-44.

Based on the 2 points, the main audience of short drama Apps is women aged of 25-44.

Gender of Ad Audience
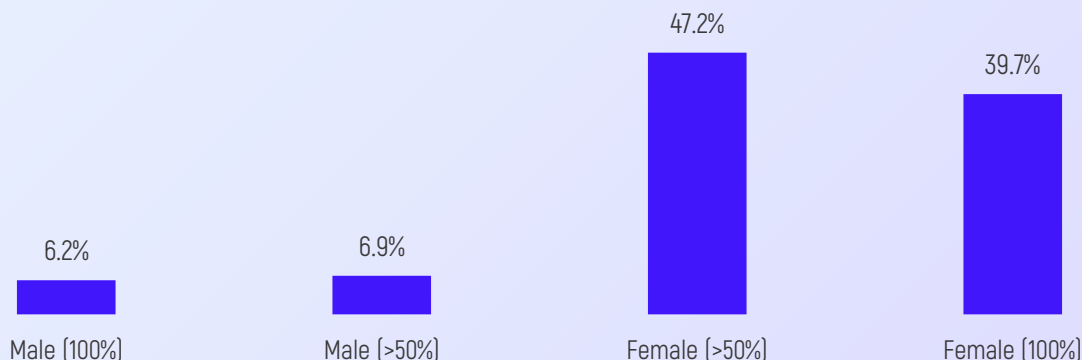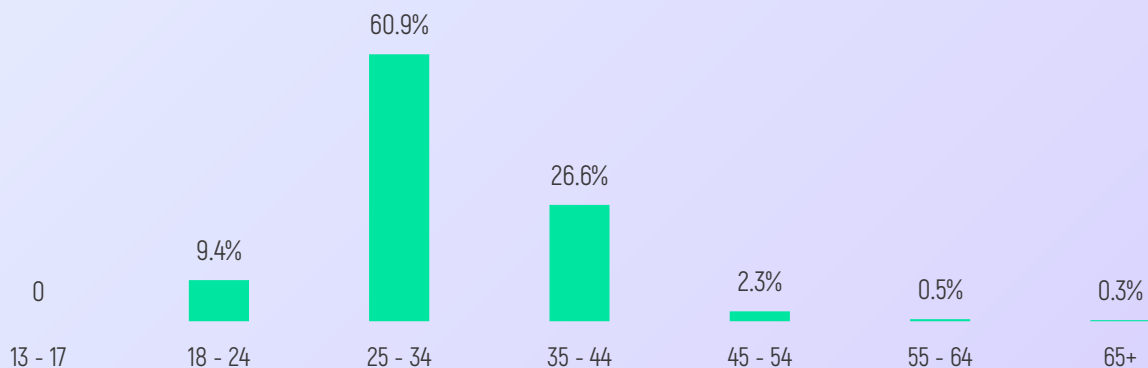
Male (100%)	Male (>50%)	Female (>50%)	Female (100%)
6.2%	6.9%	47.2%	39.7%

Age of Ad Audience

13 - 17	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
0	9.4%	60.9%	26.6%	2.3%	0.5%	0.3%

Creative Type

98.1% of the creative for short drama Apps is vertical video. The vast amount of dramas within short drama Apps provides advertisers with attractive clips to use as ad creatives.

Analyzing the duration, **94.4% of the videos are over 1 minute.** Longer videos tend to contain a more complete storyline, making ads effective in mobilizing users' emotions and stimulating them to download and use.

Creative Type

Vertical Video
98.1%

Horizontal & Square Video
1.4%

Image
0.5%

Creative Duration

0.1%

0.3%

5.2%

94.4%

<=15s

16 ~ 30s

31 ~ 60s

>=61s
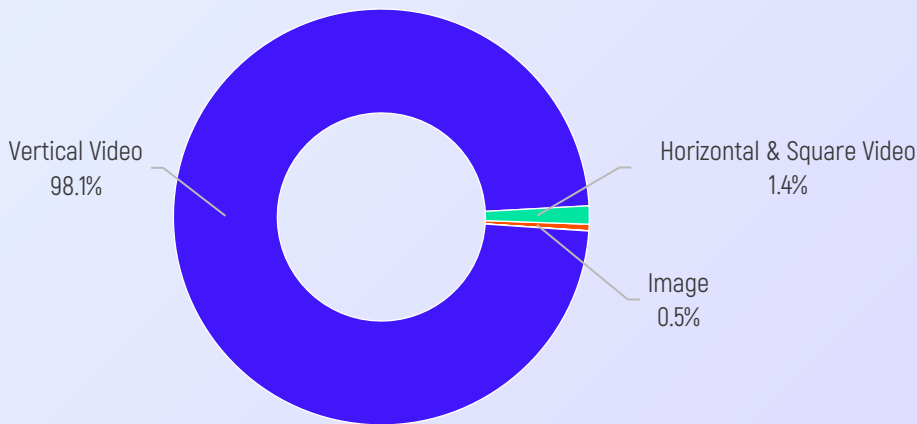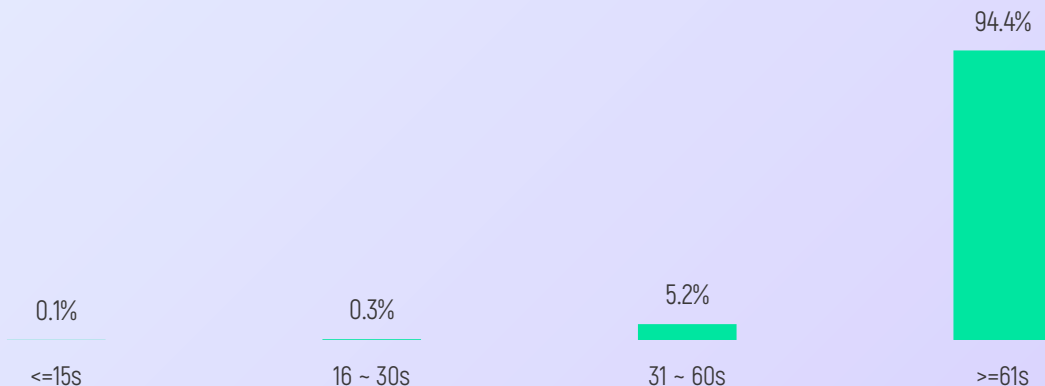
Most Advertised Apps

Google Play

01		ShortTV	Jiuzhou Wenhua
02		MoboReels	CHANGDU
03		ReelShort	Crazy Maple Studio
04		DramaBox	Dianzhong Technology
05		Kalos TV	Kalos_ShortTV
06		FlexTV	Anyue
07		DreameShort	CRATER PTE. LTD.
08		Playlet	Playlet Studio
09		HeatShort	YUNFU CloudX
10		EaShort	Easou Technology

App Store

01		MoboReels	CHANGDU
02		DramaBox	Dianzhong Technology
03		GoodShort	NEW READING
04		ShortTV	Jiuzhou Wenhua
05		ReelShort	Crazy Maple Studio
06		LoveShots	Talent Me
07		Pure Drama	BLACK GEMSTONE
08		TopShort	JoyHunter
09		HeatShort	BIDFUTURE PTE. LTD.
10		SnackShort	Menglu Culture

Newly Advertised Potential Apps

#	Icon	Name & Developer	First Ad	Ad Volume
01		MiniShorts Noventure PTE. LTD.	2024-01-23	
02		HeatShort BIDFUTURE PTE. LTD.	2024-01-04	
03		芊芊劇場 Chinese Theater	2024-01-15	
04		Shot Short SmartLogan	2024-02-02	
05		RadReel RadReel official	2024-02-04	
06		小鴨劇場 DuckDuck WorkShop	2024-01-05	
07		MIIOW TV(ميلو) TENTOO	2024-02-07	
08		BangMe JoyRead Inc	2024-01-29	
09		FunTV Yan Qing Amanda Lim	2024-01-04	
10		HotTV BYTERUN	2024-01-08	

Source: AppGrowing, 2024-01-01 ~ 2024-02-24, descending order by ad volume.
*Newly Advertised: Newly discovered Apps that started advertising during the selected time period

AppGrowing

Advertising Strategy Analysis

ShortTV	First Ad	Media	Regions
Jiuzhou Wenhua	2023-08	...[8]	49

Aug-23 · Sep-23 · Oct-23 · Nov-23 · Dec-23 · Jan-24 · Feb-24

Early Advertising
2023-08-01 ~ 2023-09-30

Top 5 Regions

USA, 15.8%
India, 12.0%
Philippines, 11.5%
Malaysia, 10.3%
Indonesia, 9.9%
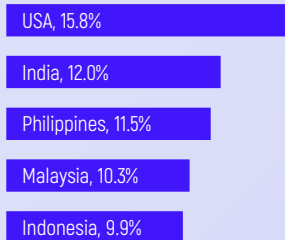
Top 5 Media

Facebook Ads, 100.0%

Stable Period
2023-10-01 ~ 2023-12-31

Top 5 Regions

USA, 5.1%
Indonesia, 3.7%
Philippines, 3.7%
UK, 3.6%
Canada, 3.5%
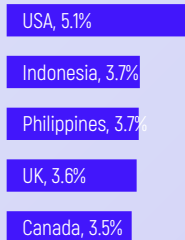
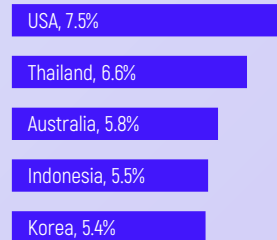### Top 5 Media

Facebook Ads, 99.5%
TikTok Ads, 0.4%
Google Ads, 0.1%
Mintegral, 0.1%

Recently
2024-01-01 ~ 2024-02-24

Top 5 Regions

USA, 7.5%
Thailand, 6.6%
Australia, 5.8%
Indonesia, 5.5%
Korea, 5.4%

Top 5 Media

Facebook Ads, 98.8%
TikTok Ads, 0.9%
Google Ads, 0.3%

AppGrowing

Ad Creative Analysis

In the early days, translated drama clips were more used to mobilize emotions with conflicts

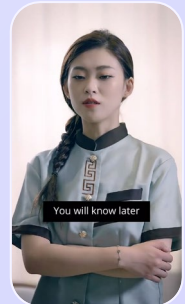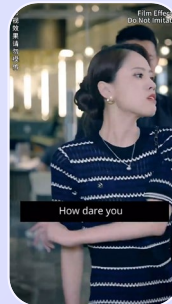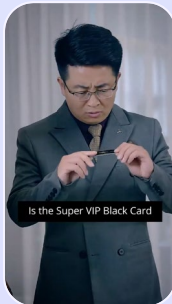| Structure	Eye-Catching Opening	Plot Twists	Download Stimulation
Screenshot	Is the Super VIP Black Card	How dare you	You will know later
Indicators **189 Days** Active Days **100** Related Ads			
Content	The cleaning staff's super VIP card shocked people. The contrast sparked interest.	The villain bullies and insults the cleaning staff, which arouses the viewers' emotions.	The video ends before the reversal. The suspense leads viewers to download the App.

Localized content appears in ads during the stable period, popular elements are integrated

Structure	Eye-Catching Opening	Plot Twists	Download Stimulation
Screenshot	THE UNWANTED WIFE OF ATTICUS FAWN	THE UNWANTED WIFE OF ATTICUS FAWN Did you just mark me?	THE UNWANTED WIFE OF ATTICUS FAWN
Indicators **113 Days** Active Days **100** Related Ads			
Content	With blonde hair, red pupils, and a hickey on the neck, the girl shows the vampire theme.	The characters' relationship is revealed in a conflict, causing viewers' emotional turmoil.	The video ends with the poster and exclusivity notice. The search box hints at downloads.

AppGrowing

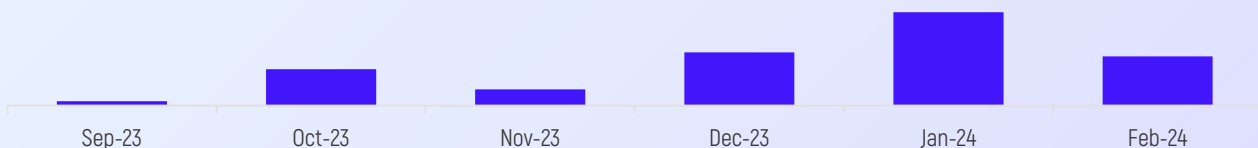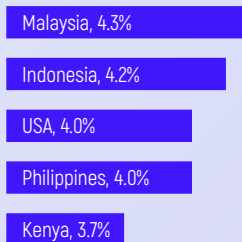# Advertising Strategy Analysis

Kalos TV
Kalos_ShortTV

First Ad
2023-09

Media

Regions
49

Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24

Early Advertising
2023-09-23 ~ 2023-10-22

Top 5 Regions

Malaysia, 4.3%
Indonesia, 4.2%
USA, 4.0%
Philippines, 4.0%
Kenya, 3.7%

Top 5 Media

Facebook Ads, 100.0%

Stable Period
2023-10-23 ~ 2023-12-21

Top 5 Regions

Philippines, 4.2%
Indonesia, 3.8%
Malaysia, 3.7%
Nigeria, 3.7%
USA, 3.5%

Top 5 Media

Facebook Ads, 100.0%

Recently
2024-01-01 ~ 2024-02-24

Top 5 Regions

USA, 4.9%
Philippines, 4.7%
UK, 4.3%
Australia, 4.1%
Canada, 3.8%

Top 5 Media

Facebook Ads, 100.0%

Source: AppGrowing. Ad stages are auto-divided by AppGrowing based on app launch and ad data trends.

AppGrowing
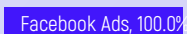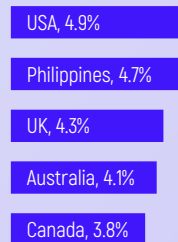
Ad Creative Analysis

Classic werewolf ABO theme. Handsome actor accurately attracts female viewers
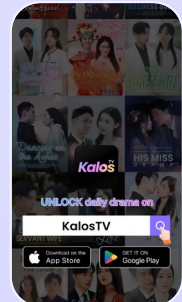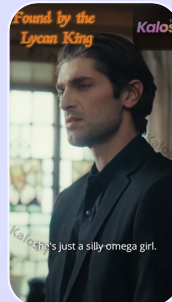
Structure	Eye-Catching Opening	Plot Twists	Download Stimulation
Screenshot			
Indicators **45 Days** Active Days **9** Related Ads			
Content	The opening leads to the theme. The majesty of the werewolf king sparks curiosity.	The werewolf appears. Close-ups show the handsome actor and lead to the ABO topic.	The background shows the dramas in the App. Search box and icons suggest downloads.

Visual stimulation excites the imagination. Classic storylines bring emotional twists
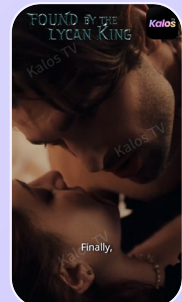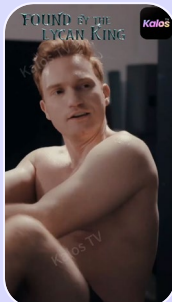
Structure	Eye-Catching Opening	Plot Twists	Download Stimulation
Screenshot			
Indicators **32 Days** Active Days **15** Related Ads			
Content	Visual stimulation from the topless actor makes female users more likely to watch.	The chase builds tension. The classic heroic rescue plot brings a twist of emotions.	The ending again shows visual stimulation, making viewers imagine and drive downloads.

AppGrowing

Advertising Strategy Analysis

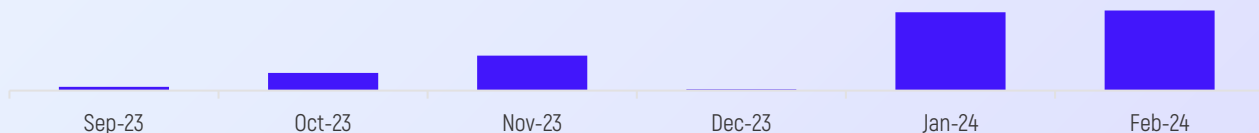| LoveShots	First Ad	Media	Regions
TALENT ME	2023-09	...(6)	15

| Sep-23 | Oct-23 | Nov-23 | Dec-23 | Jan-24 | Feb-24 |

Early Advertising
2023-09-20 ~ 2023-10-19

Top 5 Regions

USA, 100.0%

Top 5 Media

Facebook Ads, 100.0%

Stable Period
2023-10-20 ~ 2023-12-18

Top 5 Regions

USA, 17.5%

UK, 11.8%

Norway, 11.8%

Canada, 11.8%

Australia, 11.8%

Top 5 Media

Facebook Ads, 100.0%

Recently
2024-01-01 ~ 2024-02-24

Top 5 Regions

Canada, 15.6%

USA, 14.4%

UK, 11.0%

Germany, 10.8%

Australia, 10.8%

Top 5 Media

Facebook Ads, 97.7%

Unity Ads, 1.6%

Google Ads, 0.8%

Source: AppGrowing. Ad stages are auto-divided by AppGrowing based on app launch and ad data trends.

Ad Creative Analysis

Topics about independent women cater to user preferences

Structure	Eye-Catching Opening	Plot Twists	Download Stimulation
Screenshot			
Indicators **44 Days** Active Days **10** Related Ads			
Content	Besides fantasy, realistic themes about women's rising are loved by female viewers.	Housewife suffers husband's infidelity and is kicked out of home, sparking sympathy.	The video ends with the poster. The three stand to suggest a complex relationship.
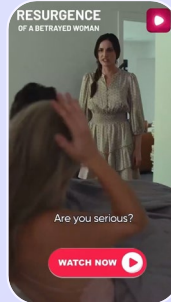
Short video creatives focus on BGM and editing
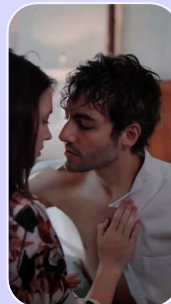
Structure	Eye-Catching Opening	Plot Twists	Download Stimulation
Screenshot			
Indicators **50 Days** Active Days **2** Related Ads			
Content	Clips of key episodes merged into one short video creative.	Short videos can't show more plots, thus relying on BGM and beats to stimulate emotions.	The poster shows key info such as name. App name and store logo guide downloads.

Global Mobile Advertising Strategy Analytics Platform

Global marketing, Know What, Know Why, Know How