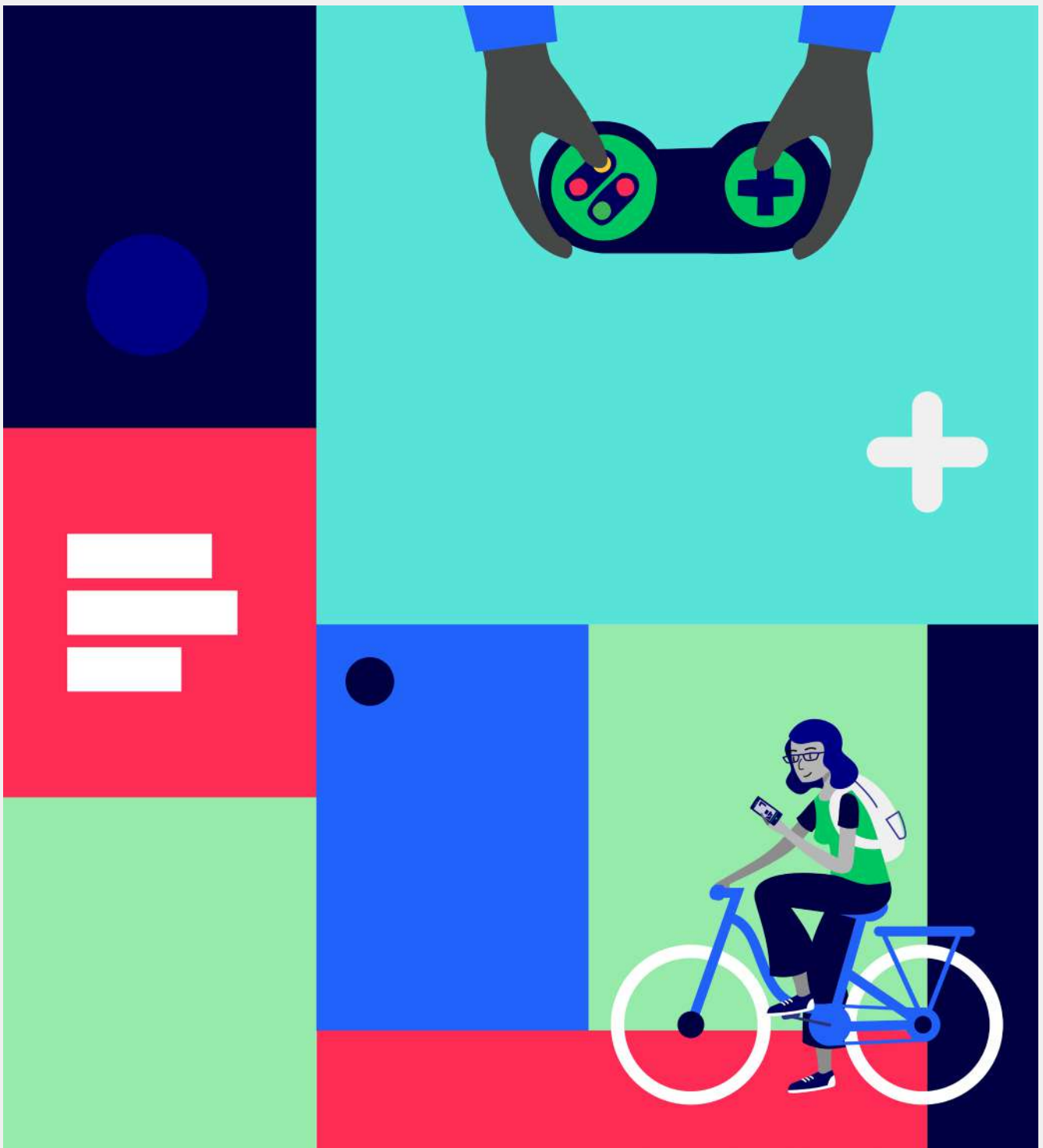
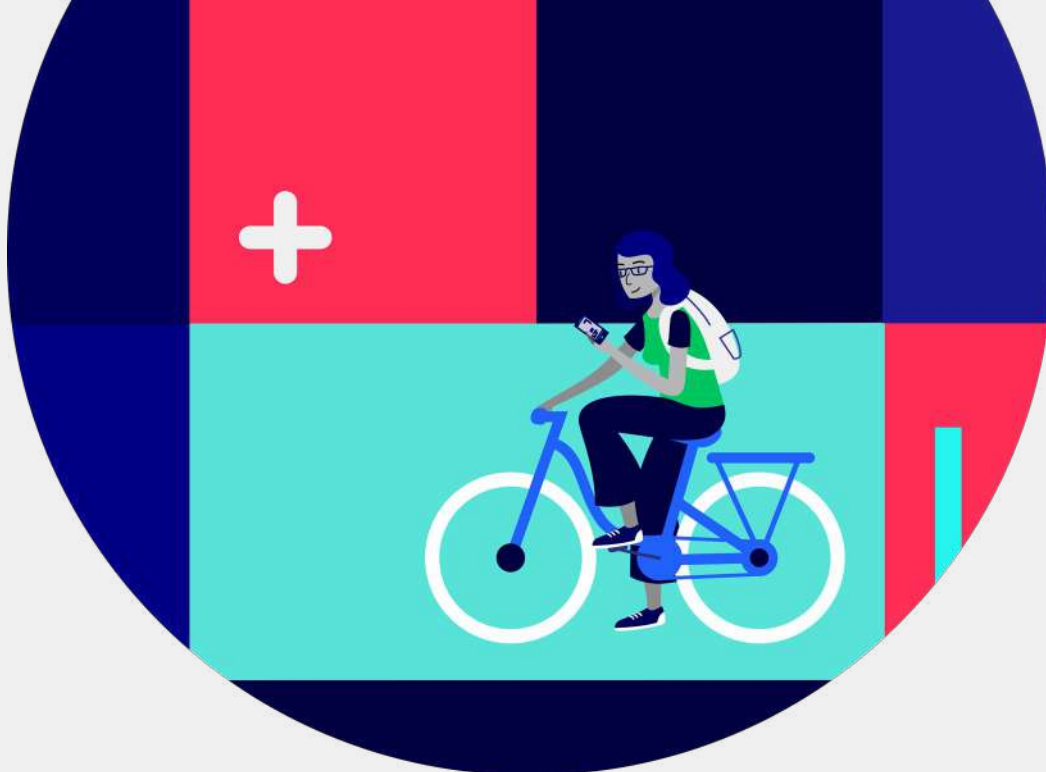


TikTok: The New Destination to Reach Global Gamers

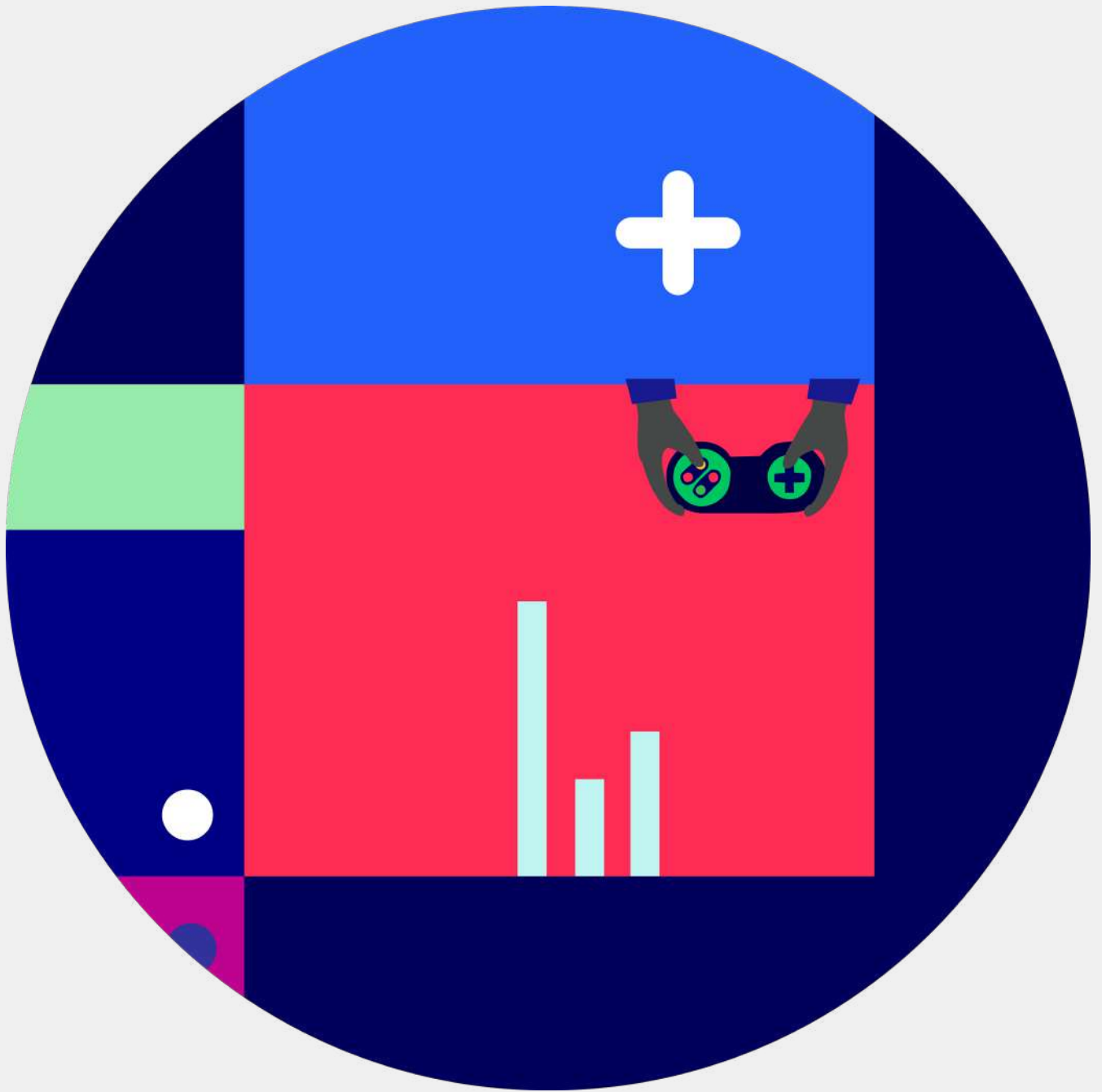
The 2021 Global Mobile Gamers Whitepaper





Contents

Introduction & Methodology	3
Mobile Gaming Industry Trends	8
Who's Playing?	16
Advertising on TikTok	25
Genre Deep Dive	31



Introduction & Methodology

Introduction

Mobile is the world's biggest and fastest-growing game platform, by both player numbers and revenues. According to Newzoo's Global Games Market Report, **mobile generated revenues of \$93.2 billion in 2021 (+7.3% year on year)**. It accounts for more than half of the global games market, meaning mobile game revenues exceed console and PC combined.

We forecast that mobile's revenue growth will reach \$116.1 billion by 2024, continuing to outpace growth on PC and console*. **Mobile is clearly a huge opportunity for all companies involved with gaming.**

To that end, **TikTok For Business** has partnered with **Newzoo** to explore this opportunity. We are proud to present this insightful report, which aims to help mobile game advertisers understand how to build, grow, and monetize their games.

Gamers have always been a highly engaged community, happily sharing recommendations, opinions, tips and tricks, and video content for as long as it's been possible to do so. TikTok's offer to advertisers is unique, supporting creative and organic campaigns that facilitate global collaborations between brands, creators, and people who play games. TikTok makes sharing this content easier, making it a platform packed with potential—the **new destination for global gamers as well as advertisers.**



\$93.2Bn

Global mobile game revenues in 2021

Source: Newzoo Global Games Market Report

49%

of mobile gamers use TikTok

Based on an aggregate of 13 countries
Details on the next page



* This is for a number of reasons, for example the impact of COVID-19 and its influence on AAA console development (which often requires considerable cross-team collaborations and high production values) as well as the appearance of higher quality mobile titles created by smaller, more agile teams and a continuation of the trend for browser players to shift to mobile.

Research Methodology















Most of the content in this report is based on a **TikTok For Business-sponsored online survey conducted by Newzoo in September and October 2021**. The research was widespread in scope and included 10,800 completed questionnaires from gamers in 13 countries and regions. These markets are dominating mobile gaming or growing and are top destinations for advertisers looking to promote their games globally.

Every respondent plays mobile games and is between the ages of 18 and 50. Roughly half of the sample in each market are TikTok users, meaning we can compare mobile gamers who use TikTok with those who do not.

In markets where more than half of respondents use TikTok*, we did not adjust the sample. However, we oversampled in markets where less than half of respondents use TikTok. We representatively boosted these samples using quotas on age and gender. Then, we weighted the sample using our Consumer Insights data on mobile gamers in the global online population, helping us provide a representative overview of this audience.

Finally, our expert games consultants and market analysts provided context to the data in this report, providing thought leadership for those looking to reach TikTok's unique mobile gamer audience.

Survey Sample:

		 Users	Non-users
	JPN	420	423
	KOR	424	423
	THA	541	283
	VNM	588	234
	IDN	537	285
	U.S.	416	421
	U.K.	421	427
	DEU	417	424
	FRA	402	420
	TUR	493	330
	SAU	525	298
	BRA	596	225
	RUS	421	406

* These are: Thailand, Vietnam, Indonesia, France, Russia, Turkey, Saudi Arabia, and Brazil. Exact numbers can be found in the opening sections of the report.

Leaders' Talk

TikTok, a destination for global gamers

TikTok is where gaming and culture collide. People come to TikTok to discover moments and movements that shape gaming culture today. TikTok is a platform where creators and brands can be their true selves, and it's inspiring to see how our community supports each other and makes genuine connections through shared interests. We're excited to continue building a place where brands of all sizes can share in these moments of joy and connection with the TikTok community.



Blake Chandlee
President
Global Business Solutions
TikTok

Win gamers with TikTok For Business

We've witnessed the positive impact that creativity and storytelling from gaming brands brings to the TikTok community and the experience of our platform. The whitepaper, in collaboration with Newzoo, shares deep insights into an ever-growing and active TikTok gaming community. We're thrilled to welcome and continue working with gaming brands large and small to help them build their brands and meaningfully connect with their community.



Steven Zhang
Head of China
Outbound Business
Global Business Solutions
TikTok

Gaming connects billions of people all over the world

The games market has grown tremendously over the last decade with three billion gamers across the world in 2021. As early believers (and examiners!) of gaming's growth, we at Newzoo have *loved* seeing games empower people, engaging and connecting fans from all corners of the globe.

I'm excited to finally unveil the insights from our joint research with TikTok For Business to the world. The findings in this report underline our shared vision for the future of games and media, where playing, creating, socializing, and viewing are united under one single experience.



Peter Warman
Co-founder & CEO
Newzoo

Summary

TikTok is a new frontier for mobile game publishers and advertisers



Mobile is the biggest and fastest-growing game platform

Mobile games accounted for 52% of 2021's global games market revenues and is expected to grow at +11.2% CAGR from 2019 to 2024.



Watching, creating, and engaging with game content is on the rise

Gaming enthusiasts spent 5 times more hours watching and almost 4 times more hours creating top gaming content on TikTok from Q1 2020 to Q1 2021.



Reach engaged mobile gamers on TikTok

TikTok mobile gamers play 36% longer than those that are not on TikTok. They also install 50% more games and are over 40% more likely to pay for both games and add-ons.



Target hard-to-reach and more diverse players

In most regions, TikTok is a viable place to reach a wider diversity of players, especially compared to other platforms.



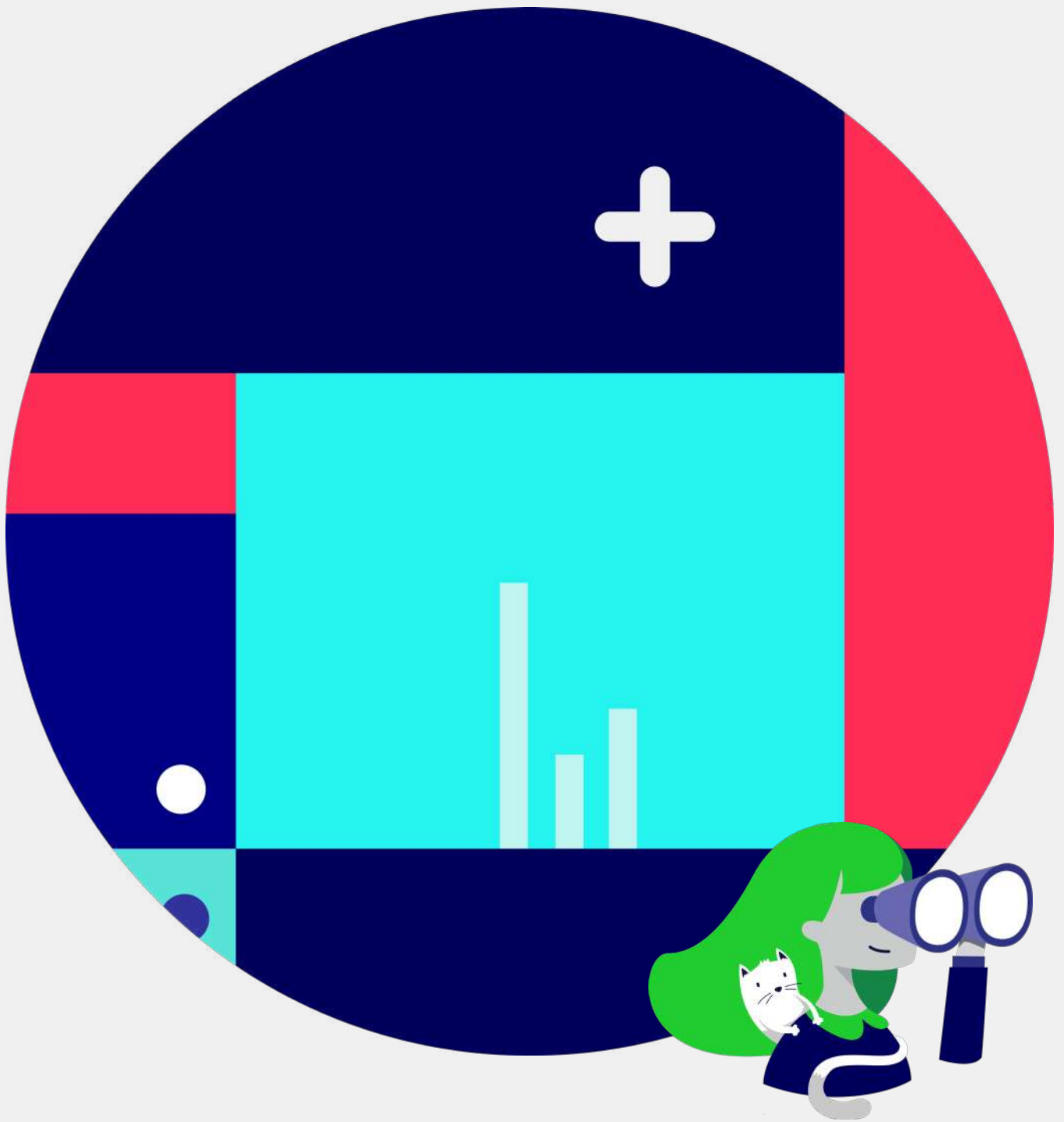
Build your game with TikTok's community

TikTok's mobile gamers are passionate: they are 50% more likely to recommend games to friends and 70% more likely to discuss games on social media. If they like your game, they will spread the word.



Drive action in marketing campaigns

Nearly 70% of mobile gamers on TikTok say the platform is a great way for developers to get their attention. The same share says they are likely to actively follow campaigns on TikTok.



Mobile Gaming Industry Trends

Key Takeaways

1

The mobile gaming market continues to outpace PC and console as the **biggest and fastest-growing gaming platform**. In 2021, **52%** of global game revenues came from mobile.

2

APAC is the largest mobile game region by revenues. Mobile gamers from the APAC region contributed **64%** of global mobile game revenues in 2021.

3

Chinese game developers are continuing to seek (and find) **international success**. In 2021, Chinese game developers made a total of **\$18.0 billion** in revenues in the international market.

4

The rising **metaverse trend** sees **games increasingly growing into social experiences**. The sharpened focus on social experience means that the **community** will have a much larger role in game development and operation.

5

Content creation inside and outside of the gaming world is the new norm for game-related engagement. Global viewership hours for TikTok's top 100 most popular gaming topics grew **+533%** from Q1 2020 to Q1 2021.

6

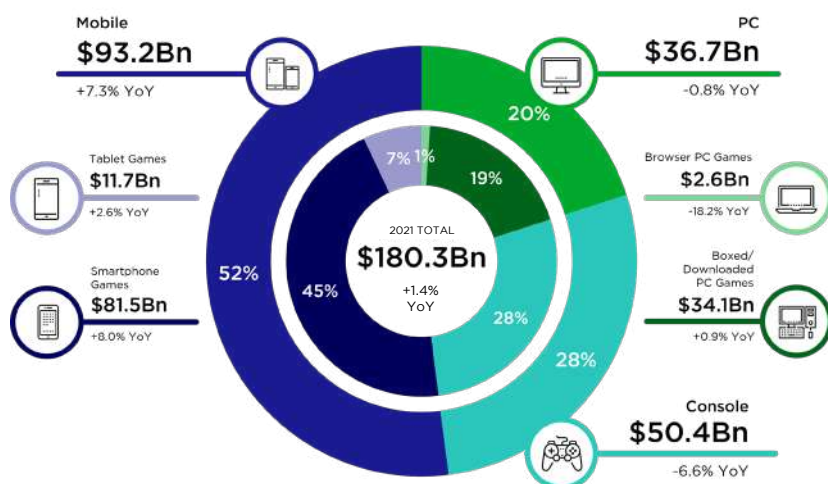
With its **1 billion** monthly users, **TikTok** has become a **new hub for brands, creators, and consumers** rallying around passionate gaming communities at scale.



Mobile: #1 Game Platform by Revenues and Fastest-Growing Toward 2024

2021 Global Games Market

Per segment



Source: © Newzoo | 2021 Global Games Market Report



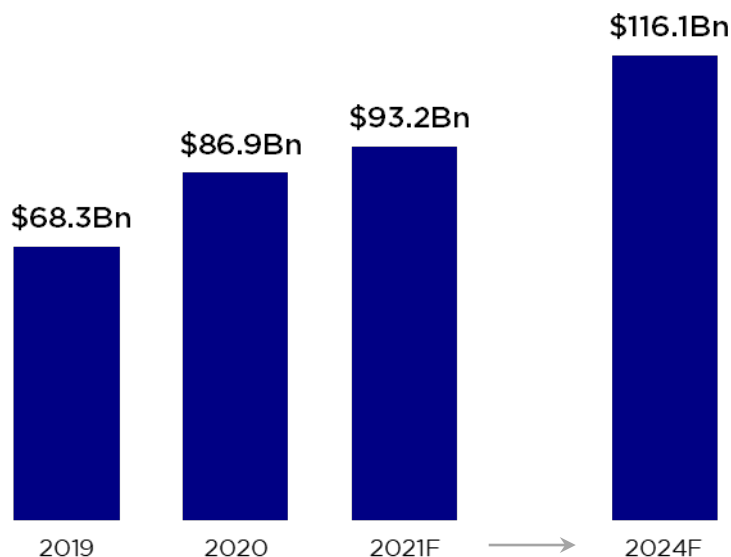
52%

of 2021's global game revenues came from mobile, making it the largest gaming segment by far. The after-effects of COVID-19—including game delays and supply constraints—are having a noticeable impact on PC and console gaming.

Mobile is less affected and grew +7.3% year on year.

Global Mobile Game Revenues

Forecast toward 2024



Source: © Newzoo | 2021 Global Games Market Report



+11.2%

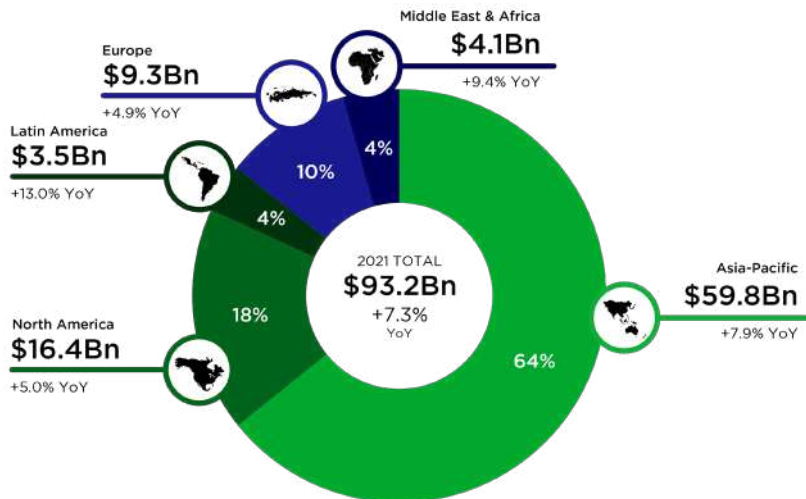
Mobile games market CAGR 2019-2024.

Mobile games will generate revenues of \$116.1 billion in 2024. This increase will be driven by growth markets in the Middle East & Africa, Latin America, Southeast Asia, and India. Mobile networks and affordable phones will continue to become more accessible across these markets.

China, the U.S., and Japan Are the Three Biggest Mobile Gaming Markets; Emerging Markets Drive Growth Toward 2024

2021 Global Mobile Games Market

Per region with year-on-year growth rates



Source: © Newzoo | 2021 Global Games Market Report



64%

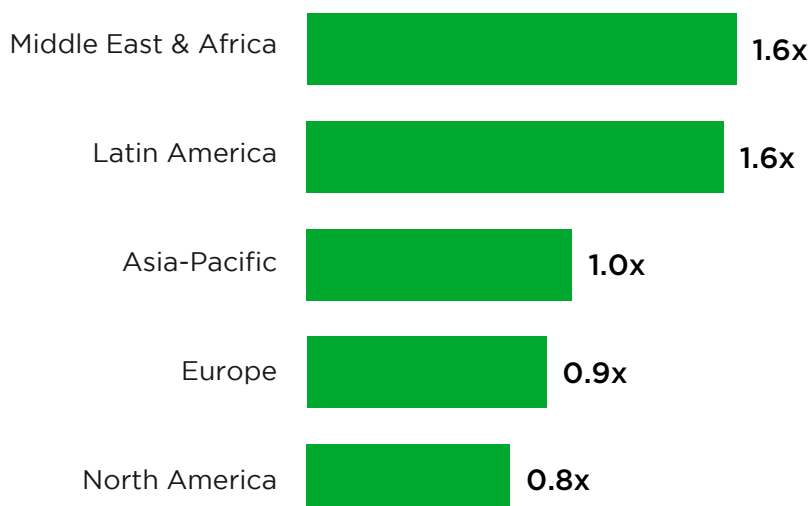
of 2021's mobile game revenues came from Asia-Pacific.

Top 3 Markets in 2021

	China Total \$31.8Bn
	U.S. Total \$15.1Bn
	Japan Total \$13.7Bn

Indexed CAGR (vs. Global) in Mobile Game Revenues

Per region | 2019-2024



Source: © Newzoo | 2021 Global Games Market Report



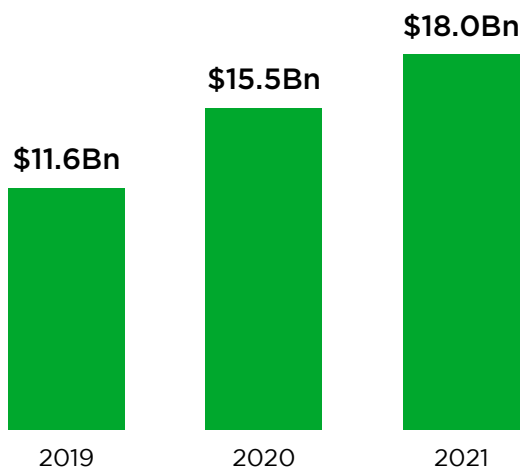
1.6X

The Middle East & Africa and Latin America will be the two fastest-growing mobile games markets toward 2024, growing 1.6x faster than the global average from 2019-2024.

Zooming in on the APAC region, **Southeast Asia** is the fastest-growing market, growing at 1.4x the global average.

Chinese Developers Are Leading the Way in the Global (Mobile) Games Market

Overseas Game Revenues by Chinese Developers 2019-2021



Source: Game Publishers Association Publications Committee (GPC) of China



+24.6%

2019-2021 CAGR of Chinese game companies' revenues outside of China. The same CAGR for global mobile game revenues is **+16.8%**, meaning Chinese companies are growing quickly outside China. As the Chinese games market becomes increasingly **saturated** and **regulated**, Chinese game companies are eyeing the international market to achieve growth goals and expand their total addressable markets.



Chinese Game Developers Find Success Across Core and Casual Genres

Chinese-developed complex and immersive games like **Mobile Legends: Bang Bang** and **Rise of Kingdoms** have found international audiences, fulfilling **core mobile gamers'** appetite for **high-fidelity** mobile games.

At the same time, Chinese developers are expanding their reach in the **casual** space. For example, **Magic Tavern's Project Makeover** has been a rising star in the Western puzzle games market.

The global success of **PUBG Mobile** and **Call of Duty: Mobile**—both developed by **Tencent**—have accelerated **PC and console developers' willingness to invest in mobile**. These franchises were created outside of China, but Tencent brought them successfully to mobile globally. More PC/console-focused AAA developers, such as Riot, Blizzard, and Electronic Arts, are bringing their most popular IP to the mobile platform.



More recently, the ongoing success of **Genshin Impact** as a **cross-platform game** showcases the capabilities of Chinese game companies beyond the mobile platform. And more and more Chinese game companies are aiming at day-one global launches. However, as you will learn on the next page, engagement with games goes far beyond just playing.

Next-Level Entertainment: Games Offer Increasingly Immersive Social Experiences

Over the past decade or so, games have become **an experience, encompassing playing, viewing, and—vitaly—social engagement**. The **metaverse** is the next stage of this evolution, integrating non-gaming experiences and driven by a combination of technology and how gamers—and even non-gamers—are interacting with games. Game publishers are providing new experiences through non-gaming content, such as virtual concerts, virtual fashion shows, IP activations, and media/product partnerships.

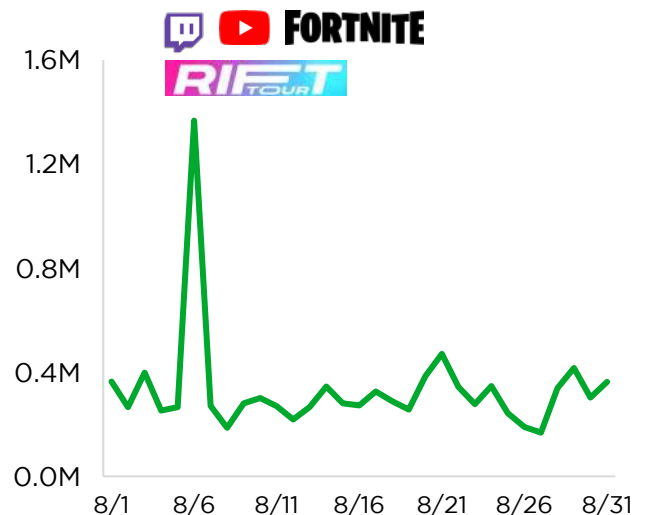


11.0M

Live hours watched on Twitch and YouTube combined of the Ariana Grande Rift Tour event.

The Impact of Ariana Grande's Rift Tour

Live hours watched in August 2021



Source: © Newzoo | Newzoo Platform

Social Metaverse Games Are Perfect Vehicles for Consumer Brands and Advertisers to Integrate Native In-Game Ads

With the rise of the metaverse, **social metaverse** mobile games such as **Avakin Life** and **Zepeto** have attracted a large amount of **branded content in the form of native in-game ads**. For example, **O Boticário**, a top Brazilian cosmetics brand, held a five-week promotion with a virtual store inside Avakin Life. In total, **2.3 million** unique players engaged during the event. As games are getting increasingly interactive and social, they become the **perfect platforms for brands and advertisers to connect with fans and reach new audiences**.

For games themselves, brand or IP injections boost **user acquisition, retention, and**

monetization. Successful brand/IP injections must be authentic, matching fan expectations and the game experience. Users are even contributing themselves. The role of players as creators is an increasingly important aspect of social gaming and the metaverse.



Going forward, we expect to see more innovation in native in-game ads, where branded content will seamlessly blend into the game world. With the rise of the metaverse trend, the ways developers integrate these native in-game ads will only become more inventive and frictionless.

Inside and Outside of the Gaming World: Content Creation Is the New Norm for Engaging With Favorite Games

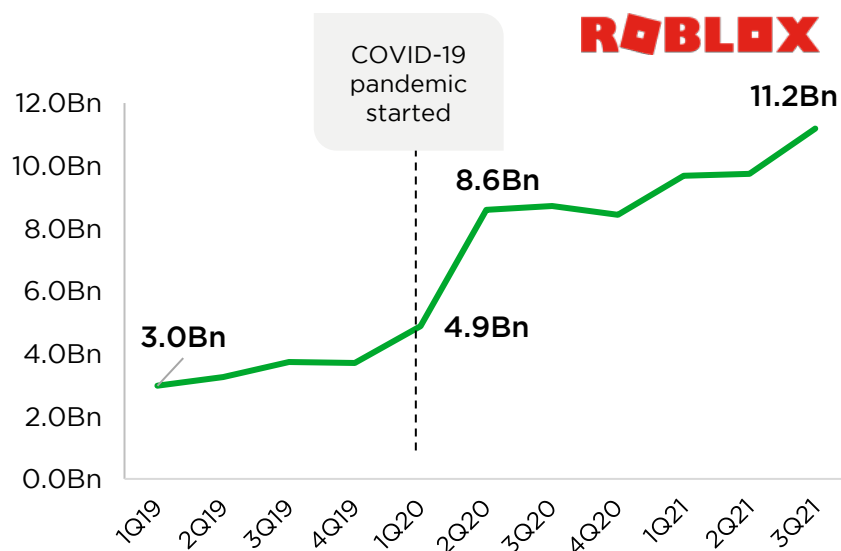


One of the key themes of the **metaverse** is **user-generated content (UGC)**. The metaverse requires community-sourced creations to **scale effectively**. Game platforms such as **Roblox**, **Crayta**, and **Core** lead the trend of user-created experiences, games, mods, and worlds.

The growth of **in-game creator tools** and **no-code development** has lowered the barriers to content creation. With the **democratization of these technologies and services**, players have become **creators themselves**.

Hours Engaged in Roblox

Q1 2019 – Q3 2021 | Global



Source: ROBLOX quarterly financials.



UGC: From In-Game Content to Streaming and Real-Life Presence

Today, **core gamers also engage with their favorite games in various ways outside of the gaming world**, such as sharing and watching game content, creating game-inspired art, and cosplaying at real-life events. **User-generated content (UGC) is a powerful UA tool** for publishers in today's games business, especially in terms of increasing organic installs.

With its creative and engaging form of content, TikTok has flourished into a **new hub for gaming publishers, creators, and gamers** across the globe. Via producing and watching UGC, gamers interact with their favorite games in an expressive way. Global viewership hours for its top 100 most popular gaming topics grew **+533%** from Q1 2020 to Q1 2021. In fact, many publishers are using TikTok to blend game advertisements into mobile gamers' everyday lives.



Growth in Viewership Among Top 100 Most Popular Gaming Topics on TikTok

Q1 2020-Q1 2021

Global	+533%
U.S.	+475%
Middle East & Africa*	+841%
Southeast Asia	+1,440%

* Including UAE, Egypt, Turkey, Saudi Arabia, and South Africa.

Marketing to Gamers: Enhance the Creation Experience and Connect to Universes Crafted by Players

Consumers go to TikTok for fun, happiness, and entertainment. The platform's ingenious innovation is its **"For You"** page and its underlying algorithms, which serve hyper-relevant and curated content that can inspire, connect, and spark creativity and joy in the community and beyond.

With its **1 billion MAUs** (as of September 2021), TikTok has become **a new hub for brands, creators, and consumers in and around games**. In just a short amount of time, TikTok users have flourished into an integral part of the gaming community.

Gamers flock to TikTok to discover and create memes, show off their gaming skills, and spark conversations that are **helping to shape and redefine today's gaming culture**.

Gaming brands have become an integral part of the TikTok experience for gamers. The platform has become a springboard for games that the community embraces. Simply put: mobile game publishers looking to **reach their core audiences across the globe** cannot afford to ignore TikTok.



As today's gamers are becoming creators themselves, **enhancing the creation experience** is a powerful way for advertisers to **connect to their core fans**.

Video-streaming and social media are major ways that gamers discover new titles. TikTok combines both with its **"creation" and "sharing" experiences**, making it an opportunity-filled advertising platform for mobile games.



Branded Solutions for Gaming Brands on TikTok

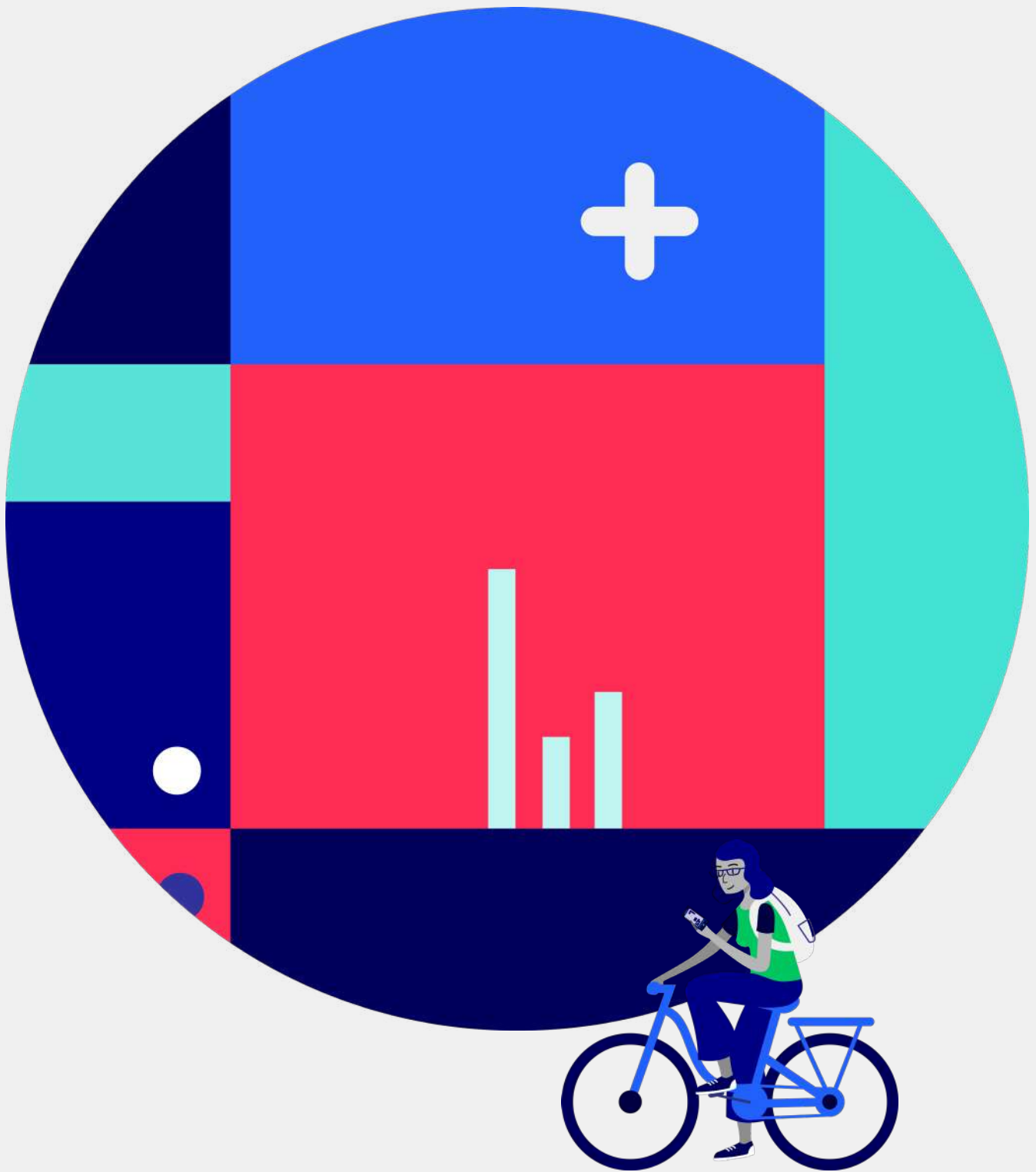
PUBG Mobile Vietnam



Hōchi Shōjo Japan



As TikTok has become the new hub for gamers and creators, gaming brands are increasingly leveraging the platform to **reach and engage with their core audiences**. Solutions such as **Branded Hashtag Challenge** and **Branded Effects** are **engaging ways to enhance the creation experience** for TikTok users.



Who's Playing?

A deep dive into the unique TikTok
mobile gamer audience

Key Takeaways

1

Almost **half of all mobile gamers in the markets we surveyed use TikTok**. Those in emerging markets tend to have even higher TikTok penetration.

2

TikTok mobile gamers are often more diverse and younger, **allowing advertisers to reach certain audiences more efficiently**.

3

TikTok mobile gamers in all markets show **higher levels of engagement**: they install 50% more games, play 36% longer, and are over 40% more likely to pay for both games and add-ons.

4

TikTok mobile gamers are more 'evangelical': they are more **passionate** about games, **recommend them to friends**, include them in their social lives, **discuss them on social platforms**, etc.

5

They are also **more likely to watch gaming content** and already say **TikTok is a key destination to do this**.

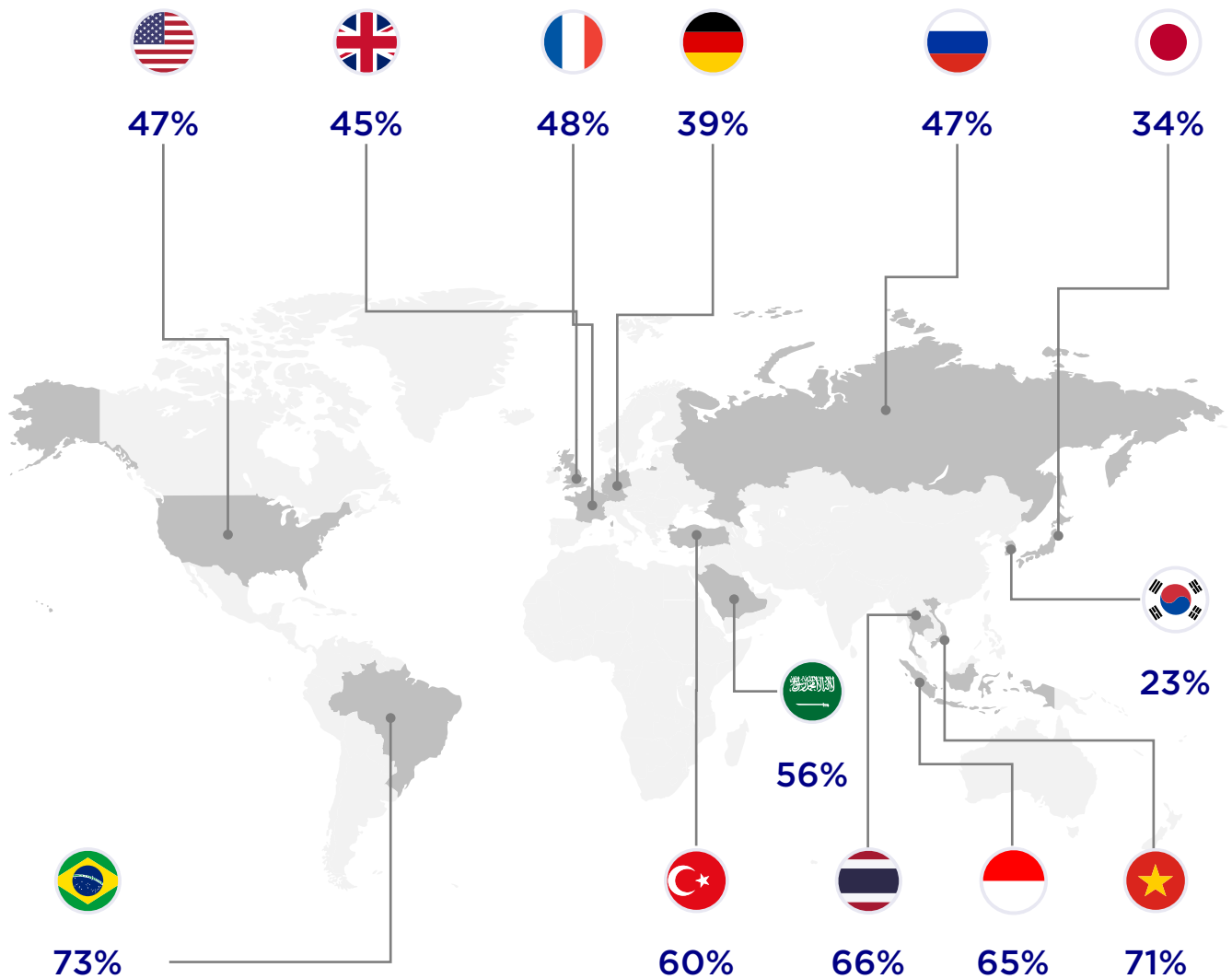
6

TikTok mobile gamers are **very likely to use social platforms and short-video apps to learn about games**, representing a clear opportunity for advertisers looking for warm and receptive audiences.



Almost Half of All Mobile Gamers in Key Markets Use TikTok

Share of Mobile Gamers Using TikTok per Market



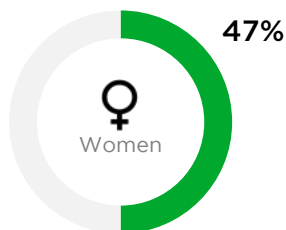
Base: All mobile gamers covered in our research

Please note all results are based on weighted data from our Consumer Insights data on mobile gamers in the global online population, helping us provide a representative overview of this audience.

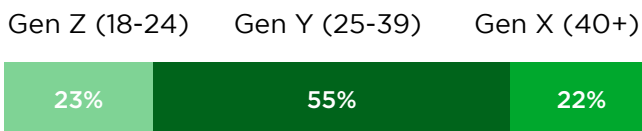
TikTok mobile gamer proportions are **especially high in Southeast Asia** (Vietnam, Thailand, and Indonesia), Brazil, and Turkey.

TikTok Mobile Gamers Are More Diverse and Younger

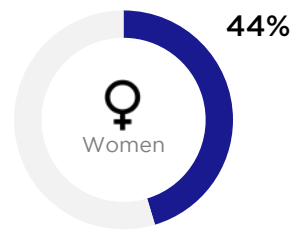
TikTok Mobile Gamers



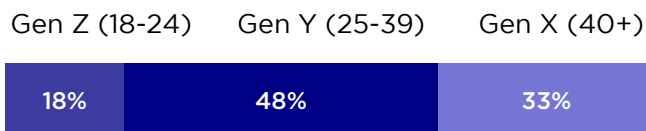
Average Age **32.1**



Don't Use TikTok



Average Age **34.3**



TikTok Is a Great Place to Find Gamers Who Can Be Hard to Find Elsewhere:

This is **especially true for gender in emerging markets** (e.g., Southeast Asia, The Middle East, and Brazil). Mobile was already popular among women in these regions. The market's ongoing growth has been key to getting new audiences into gaming.

In terms of age, **TikTok's popularity among Gen Z consumers in more established gaming markets** makes it a great place to find mobile gamers in the group.

Female TikTok Mobile Gamers (compared to Non-TikTok Mobile Gamers)

150% + ♀



120% + ♀



110% + ♀



Similar%



Gen Z TikTok Mobile Gamers (compared to Non-TikTok Mobile Gamers)

175% + Gen Z



150% + Gen Z

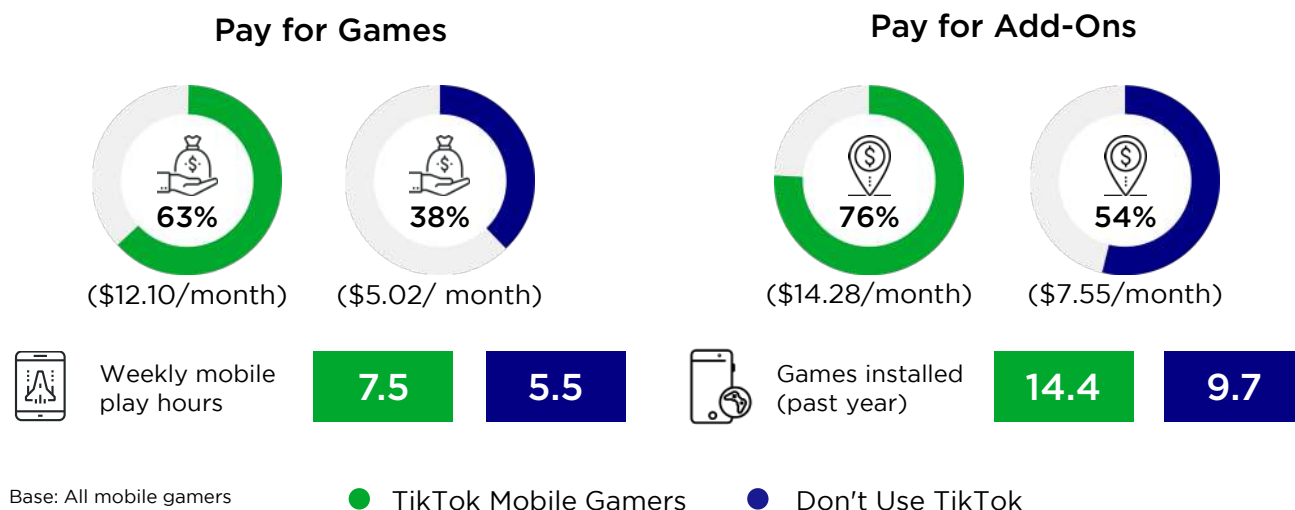


Similar%



Base: All mobile gamers

TikTok Mobile Gamers: Play Longer, Play More, and Are More Likely to Pay



Regardless of Market, TikTok Mobile Gamers Are More Engaged

TikTok gamers install 50% more games, spend 36% longer per week gaming, are 66% more likely to pay for games, and are 40% more likely to pay for add-ons. Their play hours are also usually longer. Meanwhile, payers are typically more common in emerging markets vs. markets with more mature gaming industries.

Engagement by Market | TikTok Mobile Gamers



Base: TikTok Mobile Gamers

TikTok Mobile Gamers Play More Genres

TikTok Offers Access to a Broader and More Varied Gaming Audience

TikTok mobile gamers enjoy a wider range of genres than non-users, who prefer puzzle and match games, followed by strategy. These genres are widely popular in mobile gaming, suggesting that non-users are more casual when it comes to mobile game preferences.



7.1

Average number of genres
TikTok mobile gamers play

4.2

Average number of genres **non-users of TikTok** play

Spotlight on Four Popular Mobile Genres



Strategy and MOBA

55%

of TikTok mobile gamers

34%

of **non-users of TikTok**
play this genre



Puzzle and Match

56%

of TikTok mobile gamers

50%

of **non-users of TikTok**
play this genre



Arcade, Casual & Idle

48%

of TikTok mobile gamers

32%

of **non-users of TikTok**
play this genre



Role Playing

32%

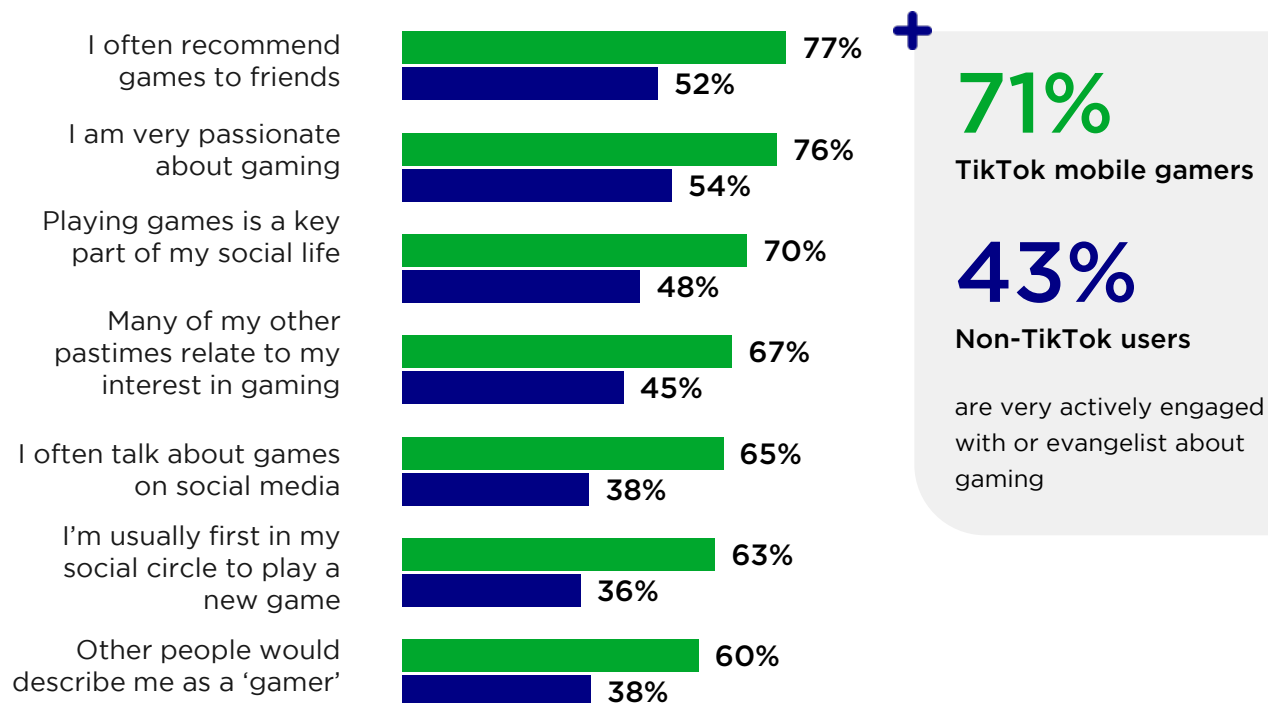
of TikTok mobile gamers

22%

of **non-users of TikTok**
play this genre

TikTok Mobile Gamers: More Likely to Recommend, Discuss, and Socialize in Games

Agreement With Statements ('agree', 'strongly agree', and 'agree completely')



Base: All mobile gamers

● TikTok Mobile Gamers ● Don't Use TikTok

Compared to non-users, **TikTok mobile gamers are nearly 50% more likely to recommend games to friends. They are over 70% more likely to talk about games on social media.**

TikTok mobile gamers are also more passionate about games and are likelier to use them to socialize. Gaming is also more likely to complement their other pastimes.

Gamers in **France, Indonesia, Turkey, and Brazil** are most passionate. TikTok mobile gamers are most likely to agree that they are very passionate about gaming (compared to all other statements).

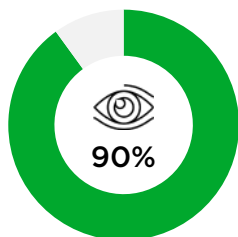
Gamers in **Japan** are likely to see games as key to their social lives; this is the top statement for gamers in Japan.

Thailand is the only market where the top statement is about how gaming relates to other pastimes they enjoy.

Base: TikTok mobile gamers

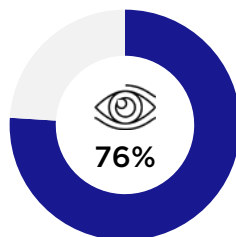
Almost All TikTok Mobile Gamers Watch Gaming Content

TikTok Mobile Gamers



Watch gaming content

Don't Use TikTok



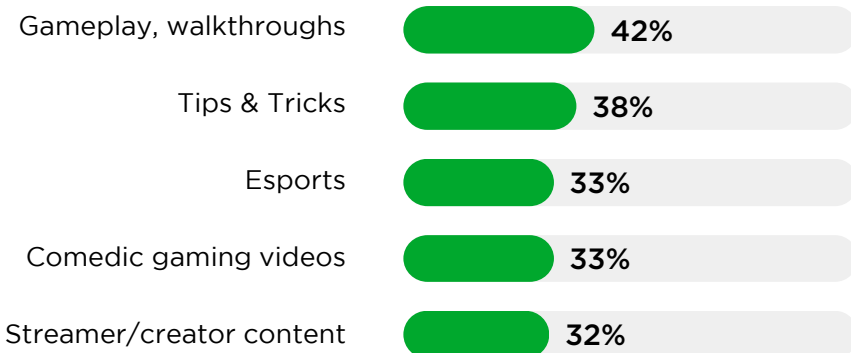
Watch gaming content



Most mobile gamers engage with their favorite titles beyond playing. They are also avid viewers of gaming content.

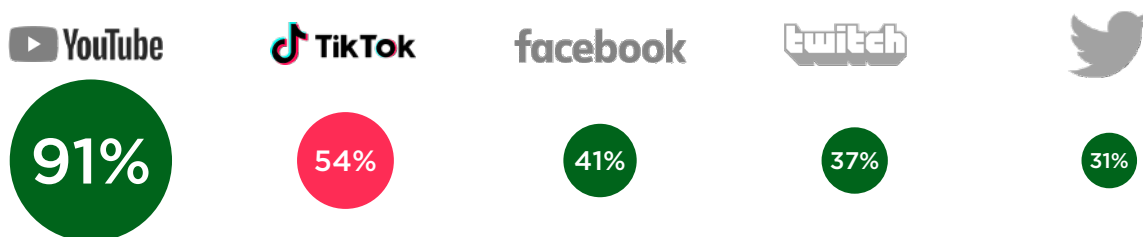
Around 9 in 10 mobile gamers in South Korea, Thailand, Vietnam, Indonesia, Turkey, Saudi Arabia, and Brazil watch game-related content. This number is even higher for TikTok mobile gamers. Elsewhere, overall viewing penetration is around 80%, while TikTok mobile gamer numbers are closer to 90%. Gameplay and walkthrough content is most popular, followed by tips and tricks.

Most Popular Content: Gameplay Videos and Tips & Tricks | TikTok Gamers



Esports content is especially popular in Asia, ranking either first or a close second in every market in the region.

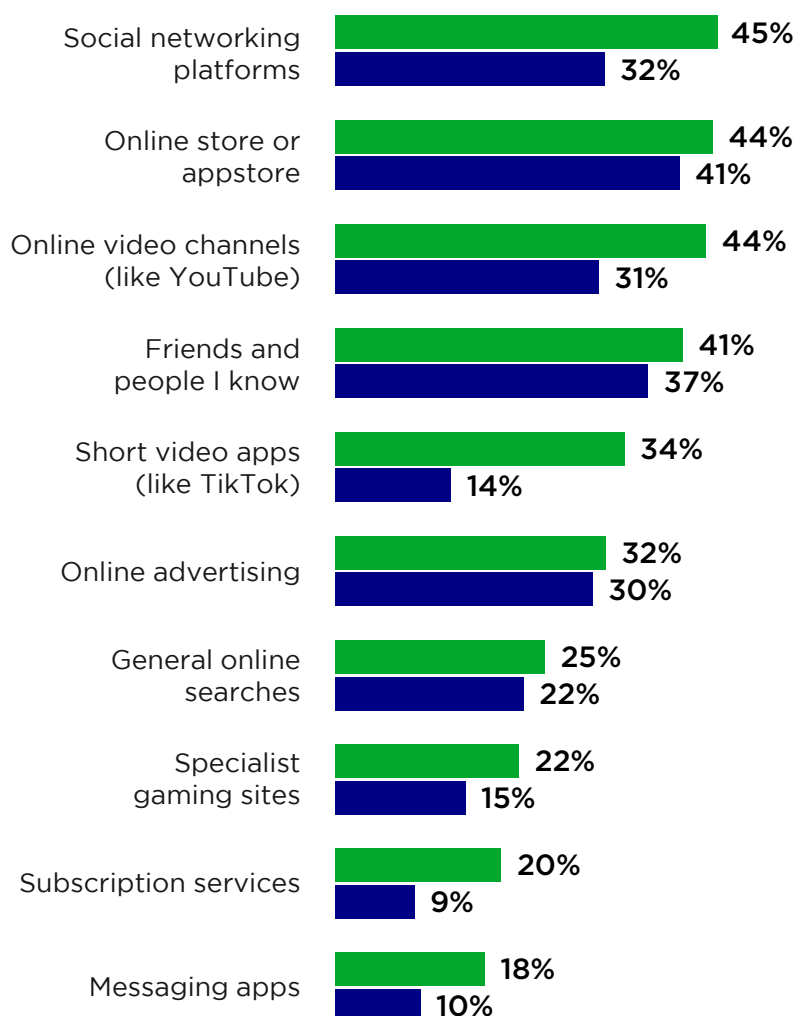
TikTok Gamers Say TikTok is Second Only to YouTube for Viewing Content



This story is the same for all markets apart from Thailand, Vietnam, and Japan. In these markets, TikTok is third after YouTube, followed by either Facebook (Thailand and Vietnam) or Twitter (Japan).

Social Networks: The Most Common Source of Game Information for TikTok Mobile Gamers

Where Do Mobile Gamers Learn About Games?



Base: All mobile gamers

● TikTok Mobile Gamers ● Don't Use TikTok

TikTok mobile gamers are much more likely to use short-video apps to get gaming information.

This is even more popular in some markets:

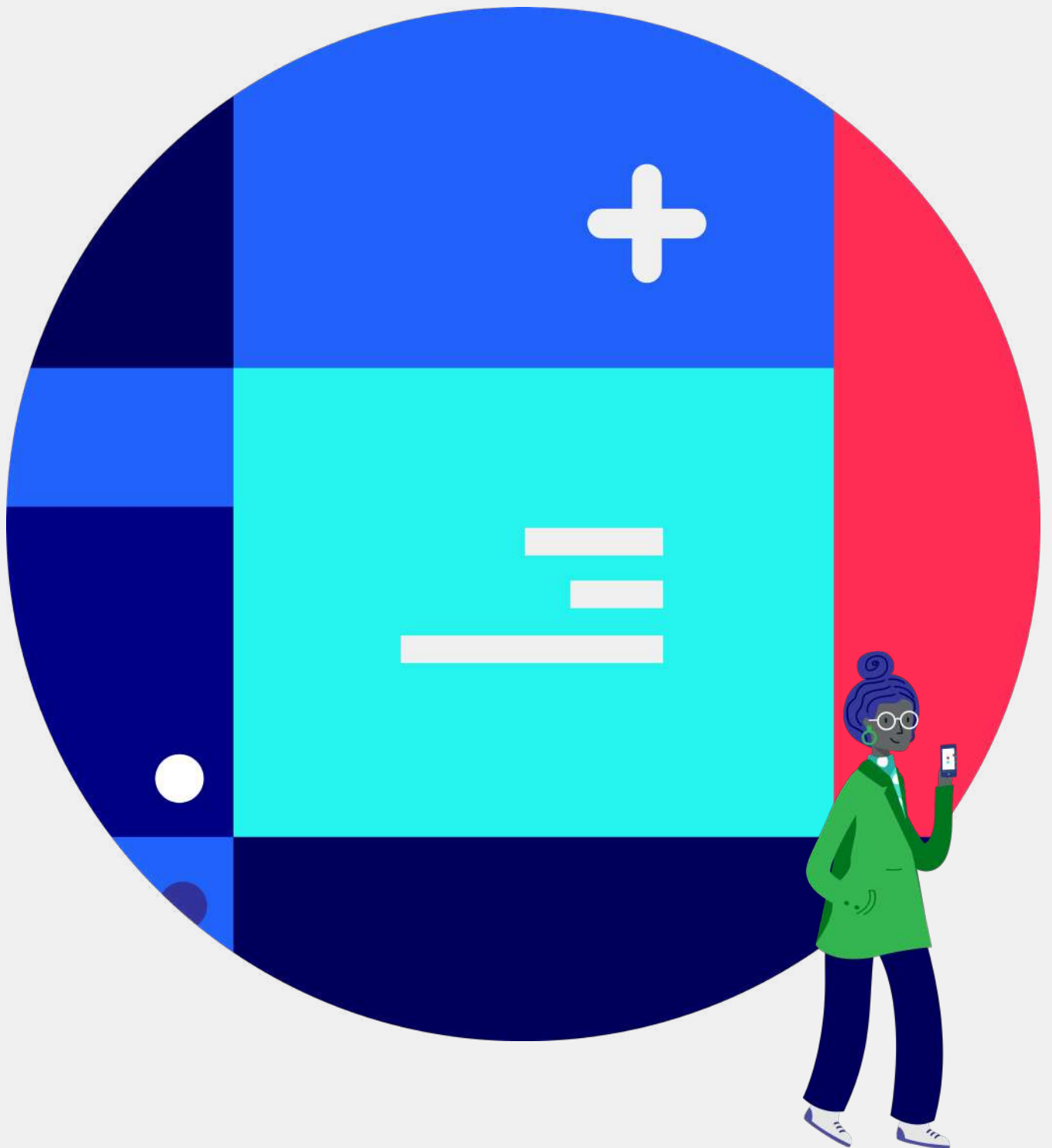
- Indonesia: 44%
- Thailand: 43%
- Brazil: 37%
- France: 37%
- U.S.: 37%
- Saudi Arabia: 36%

TikTok Mobile Gamers Use a Wider Range of Information Sources Than Non-Users.

Social networking platforms are the number one resource everywhere but the U.K., Brazil, South Korea, and Russia (and even here, they are among the top four channels, except in Russia where they are fifth).

TikTok Mobile Gamers Are More Than Twice as Likely to Find Games via Subscriptions.

Around 20% of TikTok mobile gamers use subscription services to find games vs. 9% of non-users. We can therefore expect that TikTok mobile gamers are more open to subscriptions, a growing business model among many companies.



Advertising on TikTok

How to run effective campaigns on TikTok

Key Takeaways

1

TikTok mobile gamers are **very positive about seeing more game content on the platform**. They are also excited to follow new and unique campaigns.

2

First and foremost, TikTok mobile gamers want advertisers to tell them about **characters, settings, story, and the overall game objectives**.

3

Action-packed, trendy, and friendly campaigns have greater appeal among TikTok mobile gamers vs. non-users, **as do as campaigns based on real life and real people**.

4

Mobile gamers on TikTok are open to more types of campaign vs. non-users. **Advertisers can get creative** and try new things.

5

TikTok mobile gamers are more than twice as likely to notice certain types of online ads, especially **sponsored events & livestreams, user-generated content (UGC), memes and challenges, and branded content**.



TikTok: A Clear Opportunity for Advertisers

TikTok's Audience Is Keen for More Promotional Gaming Content

TikTok mobile gamers across all markets agree that **the platform can offer developers new and unique ways to show off their games**. The group also has a strong desire to see more content and follow mobile gaming campaigns on TikTok. Developers and publishers on TikTok can benefit from this appetite for content.

At the same time, game makers can use TikTok to target hard-to-reach younger gamers who install more games, play for longer, and are more willing to spend money on them. The opportunity is huge.



TikTok mobile gamers also show **an appetite for gaming campaigns that are blended with content on TikTok**. Therefore, partnering with game-related content creators on the platform could be a viable way to resonate with gamers on TikTok.

As more than two-thirds of TikTok mobile gamers expect to spend more time on the platform in the coming months, these opportunities for advertisers are only due to increase.

Agreement With the Following Statements* | TikTok Mobile Gamers



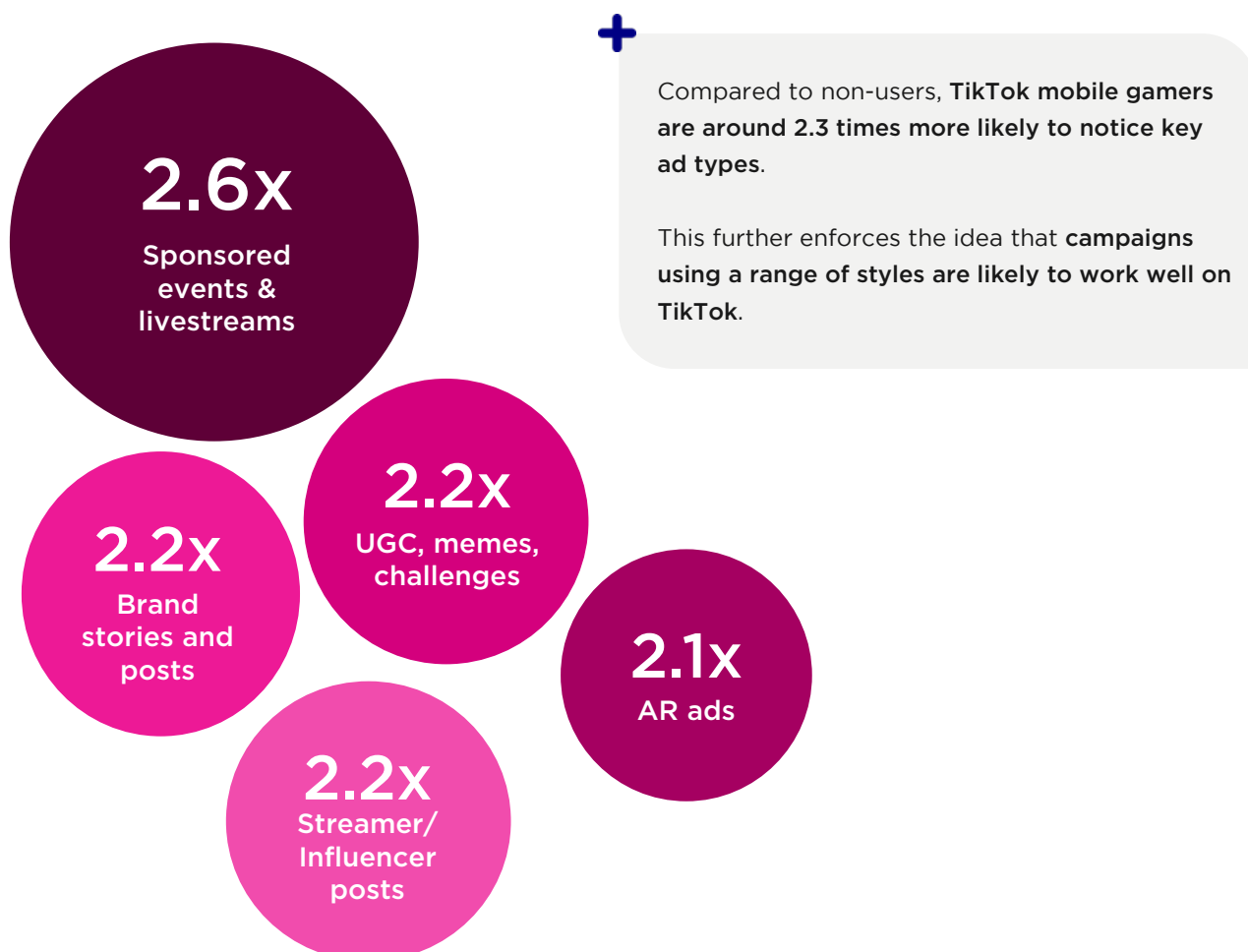
*Respondents selected either agree or strongly agree

TikTok Mobile Gamers Are Twice as Likely to Notice Innovative Content Ads

TikTok Mobile Gamers Are More Likely to Pay Attention to Online Gaming Advertising

Between 26% and 29% of TikTok mobile gamers say they are very likely to notice all key online ad types for games (compared to between 12% and 16% of non-users). This suggests all ad types are about equally effective for attracting the attention of this group. Therefore, **advertisers have many opportunities to develop creative campaigns on TikTok, using multiple ad styles.**

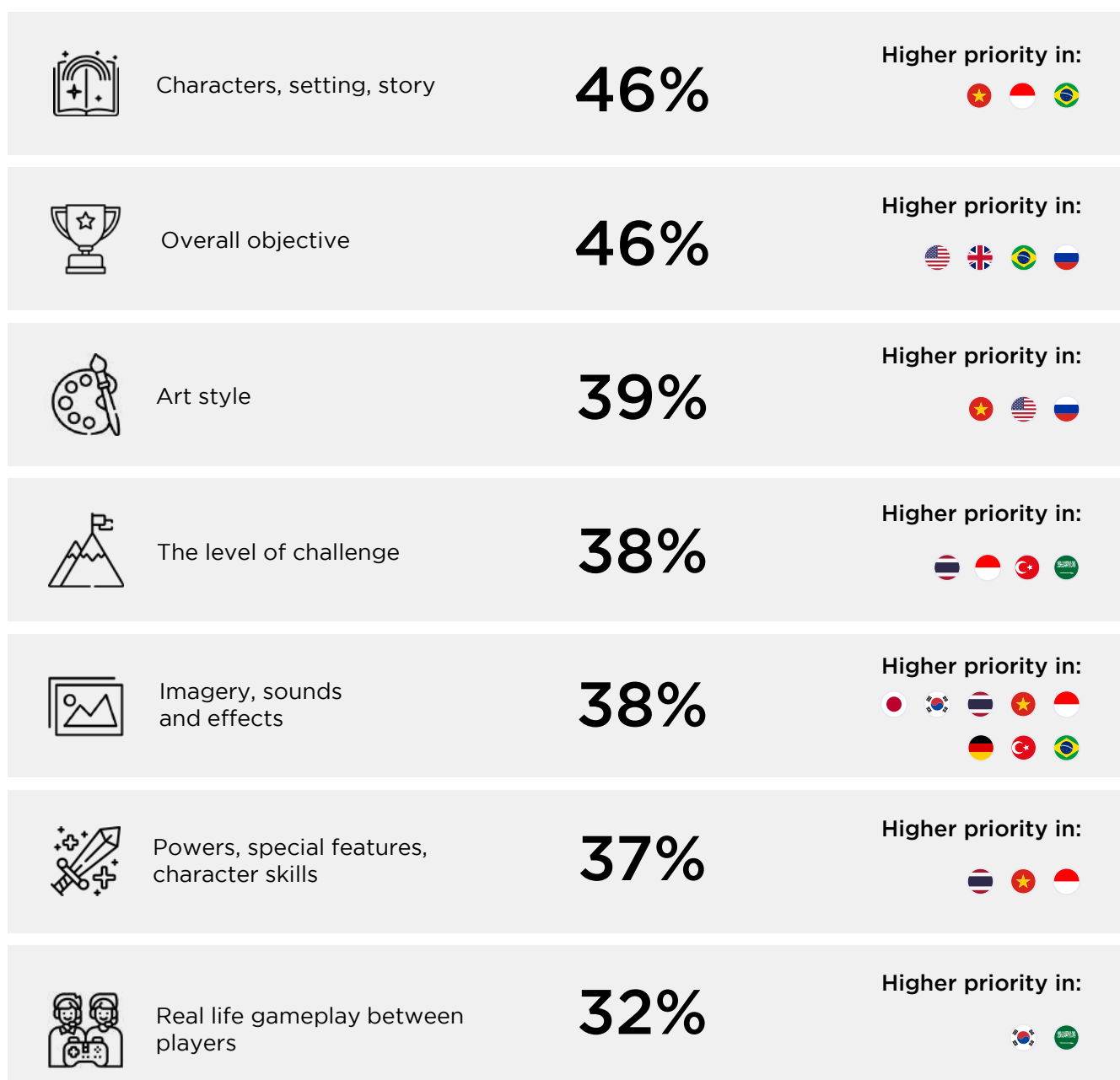
Very Likely to Notice Ad Types | TikTok Mobile Gamers vs. Non TikTok Users



Advertisers Should Prioritize Story, Settings, Characters, and Overall Game Objectives

What TikTok Mobile Gamers Most Want Advertisers to Communicate

TikTok mobile gamers globally want advertisers to focus on similar things. **Characters, settings, story, and the overall game objective are the most important.** However, there are some differences to consider when building local campaigns.

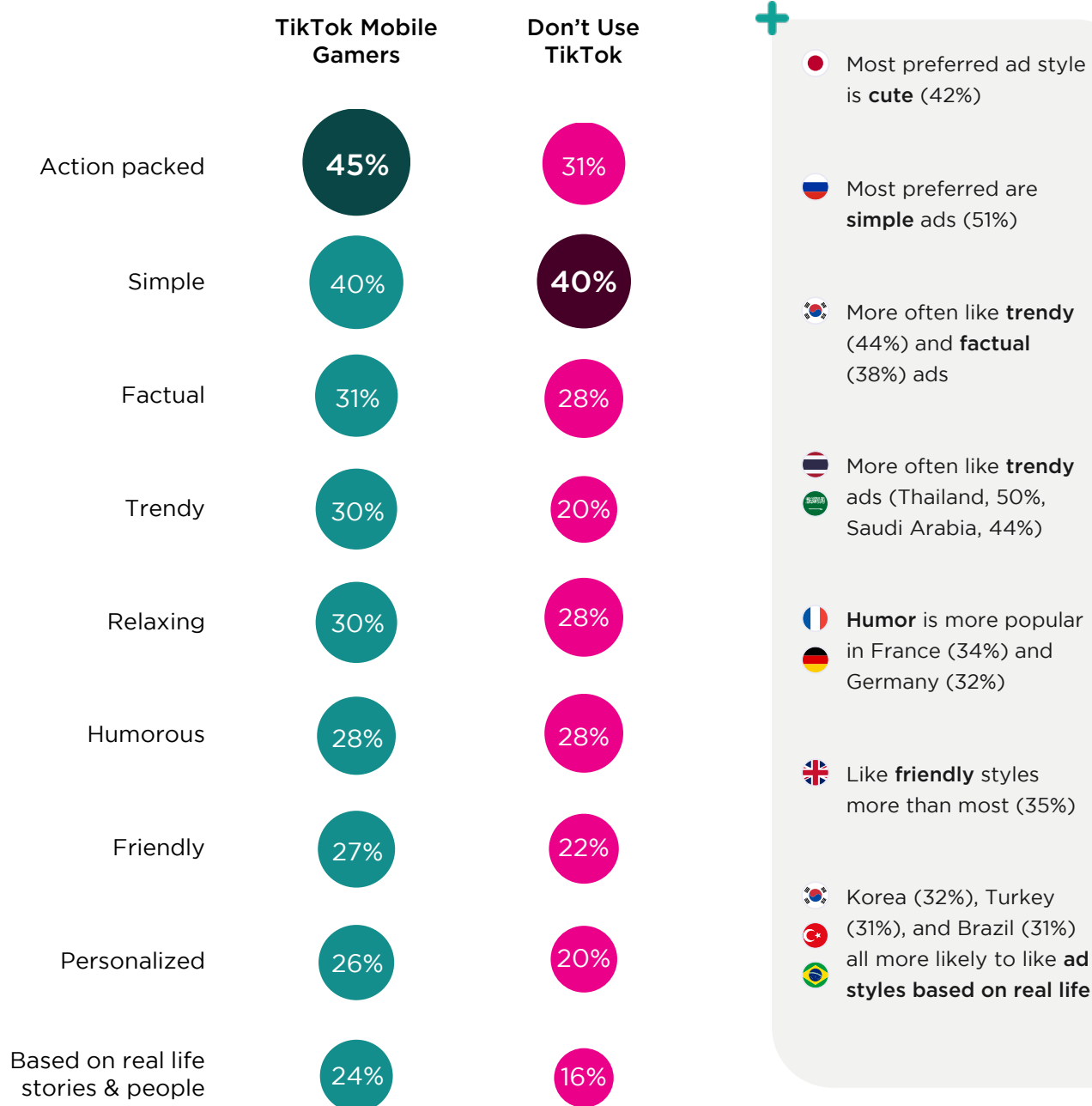


Base: All TikTok mobile gamers

Advertisers Can Be More Creative on TikTok: Its Gamers Are More Open to All Ad Styles

Ad Styles TikTok Mobile Gamers Enjoy Most

TikTok mobile gamers are much more likely to enjoy **action-packed**, **trendy** and **friendly** ads, as well as **ads based on real life**, compared to non-TikTok users.



Base: All mobile gamers



Genre Deep Dive

Reasons to play, pay, churn, and return

Genre Deep Dive

A focus on key genres

The following pages show the results of the research's genre deep dive. **We analyze motivations for playing, paying, churning, and returning to games within certain genres.** This is a valuable reference for mobile developers and publishers looking to support their strategies, market their games, and increase user retention and acquisition.

We selected **four key genres** for this analysis, based on their importance to mobile gamers and their relevance to mobile developers and publishers. These are defined below.

To streamline reporting, we focus on the most mature global gaming markets (Japan, Korea, U.S., U.K., Germany, and France), emerging Southeast Asian markets (Thailand, Vietnam, and Indonesia—as a single group), and finally Brazil for a Latin American perspective.

Strategy and Battle Arena (MOBA) Games like Clash of Clans, Lords Mobile, Teamfight Tactics, Auto Chess, Clash Royale, Civilization, Plants vs. Zombies, Kingdom Rush, Arena of Valor, Vainglory, Mobile Legends: Bang Bang, etc.



Puzzle and Match Games like 2048, Sudoku, Angry Birds, Monument Valley, Words with Friends, Bejeweled, Candy Crush, Gardenscapes, Toy Blast, Bubble Shooter, etc.



Casual, Arcade and Idle Games like Among Us, Subway Surfers, Temple Run, Archero, Streets of Rage, Helix Jump, Aquapark.io, Zigzag, Hole.io, AMAZE!!!, Stack Ball 3D, Idle Miner Tycoon, Adventure Capitalist, Tap Tap Trillionaire, etc.



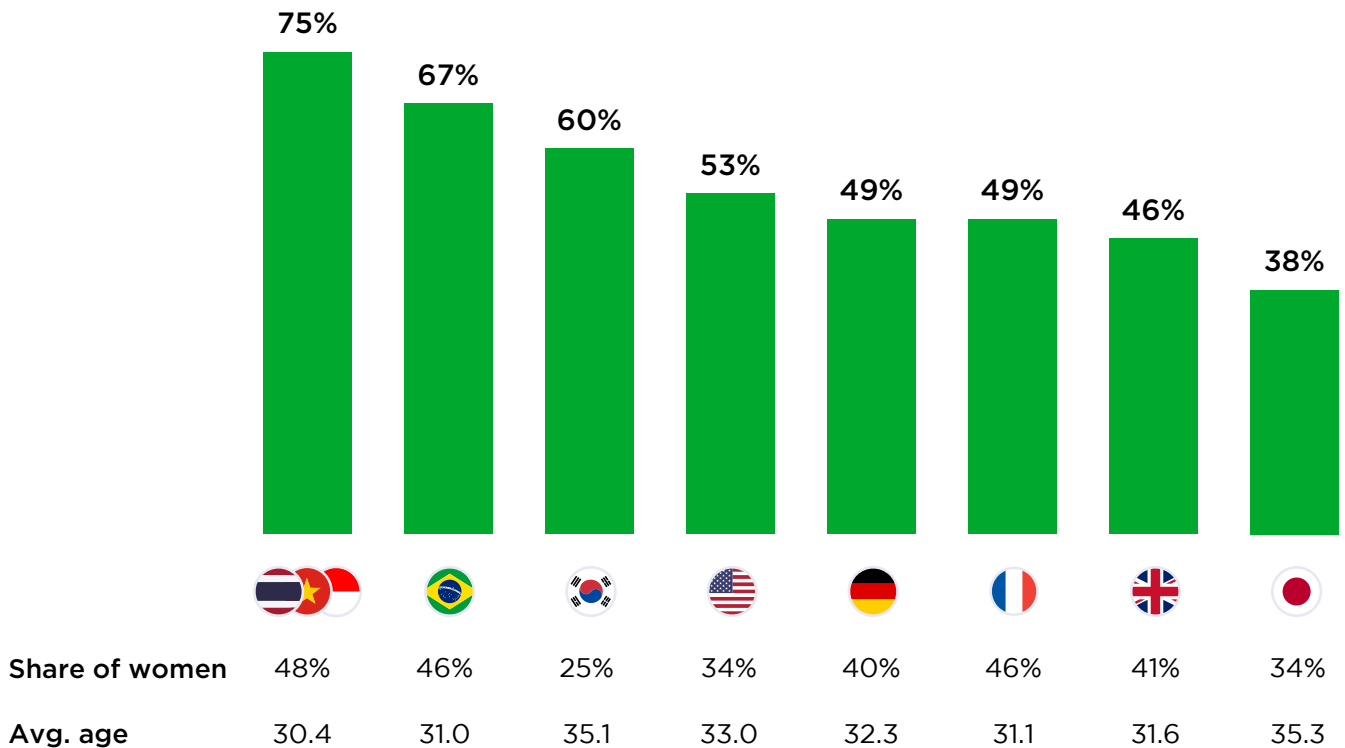
Role Playing Games like Empires & Puzzles, Monster Strike, AFK Arena, Summoners War, Raid: Shadow Legends, Kim Kardashian: Hollywood, Lineage, Fire Emblem, etc.



Strategy Games Are Really Popular, Especially in SEA, Brazil, and South Korea

Strategy Games: How Many Play and Who Plays?

Base: TikTok mobile gamers



Strategy Players Skew Male and Tend to be in Their Early 30s.

Looking at the averages across all markets, TikTok strategy players are most likely to be male and in their early thirties. Still, there are high shares of female players in each market, especially in SEA, Brazil, and France. TikTok mobile gamers are more likely to play the genre vs. non-users.

Strategy Is Especially Popular in SEA and Demographics Are Diverse.

An impressive three-quarters of mobile gamers in SEA emerging markets play strategy games. SEA's strategy players are younger and more diverse in terms of gender vs. those in the other markets.

Problem-Solving, Creativity, Excitement, and Competition Motivate TikTok Mobile Gamers



Reasons to Play

- 33% To relax/unwind
- 31% To solve problems tactically
- 30% To be creative
- 29% For adrenaline/excitement
- 29% To escape from everyday life

Base: TikTok users who play mobile strategy or MOBA games, selected for deep dive



Relaxation often tops the list, but motivations to play strategy games differ across markets. Players in emerging markets tend to be thrill-seekers. Playing for excitement is the #1 answer in **Brazil** and #3 in **SEA**.

Escapism is important for TikTok gamers in mature markets, while those in **Japan** and **South Korea** are very motivated by achievements.



Reasons to Pay

- 43% Unlock extra playable content
- 38% Personalize your character
- 35% Take advantage of a sale/offer
- 32% Support a game/developer
- 30% Get access to seasonal content

Base: TikTok users who play mobile strategy or MOBA games, selected for deep dive



Reasons for paying are relatively similar across the markets. The top answer across almost all markets is unlocking extra content. This is popular across all genres, but especially for strategy.

Offers and sales are another viable way to entice players to pay.

TikTok mobile gamers across all markets are also likely to pay to personalize their characters. **Brazil** is especially enthusiastic about paying for these customization options.



Strategy



Puzzle



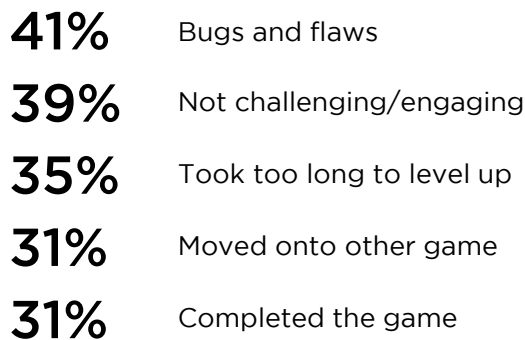
Casual/
Arcade



Role
Playing

TikTok's Strategy Gamers Churn Due to Bugs and Challenge but Return for Content

Why do Players Churn?

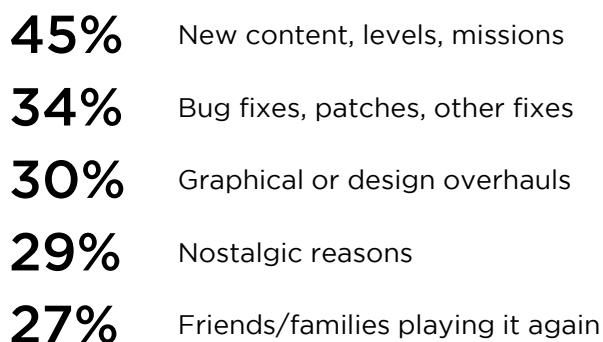


Base: TikTok users who play mobile strategy or MOBA games, selected for deep dive

South Korea's gamers are serious about strategy games, so it's no surprise that more than half of its TikTok mobile gamers churn from the genre when it's not challenging enough. This is a top reason for most markets.

The U.S. is the only market in which "moved onto other game" is the top answer.

Why do Players Return?



Base: TikTok users who play mobile strategy or MOBA games, selected for deep dive

Content is king; new content, levels, or missions is the top reason gamers come back to a game in every market except **France** (where it was number two). Free content might be a way to win back players who are thinking about returning.

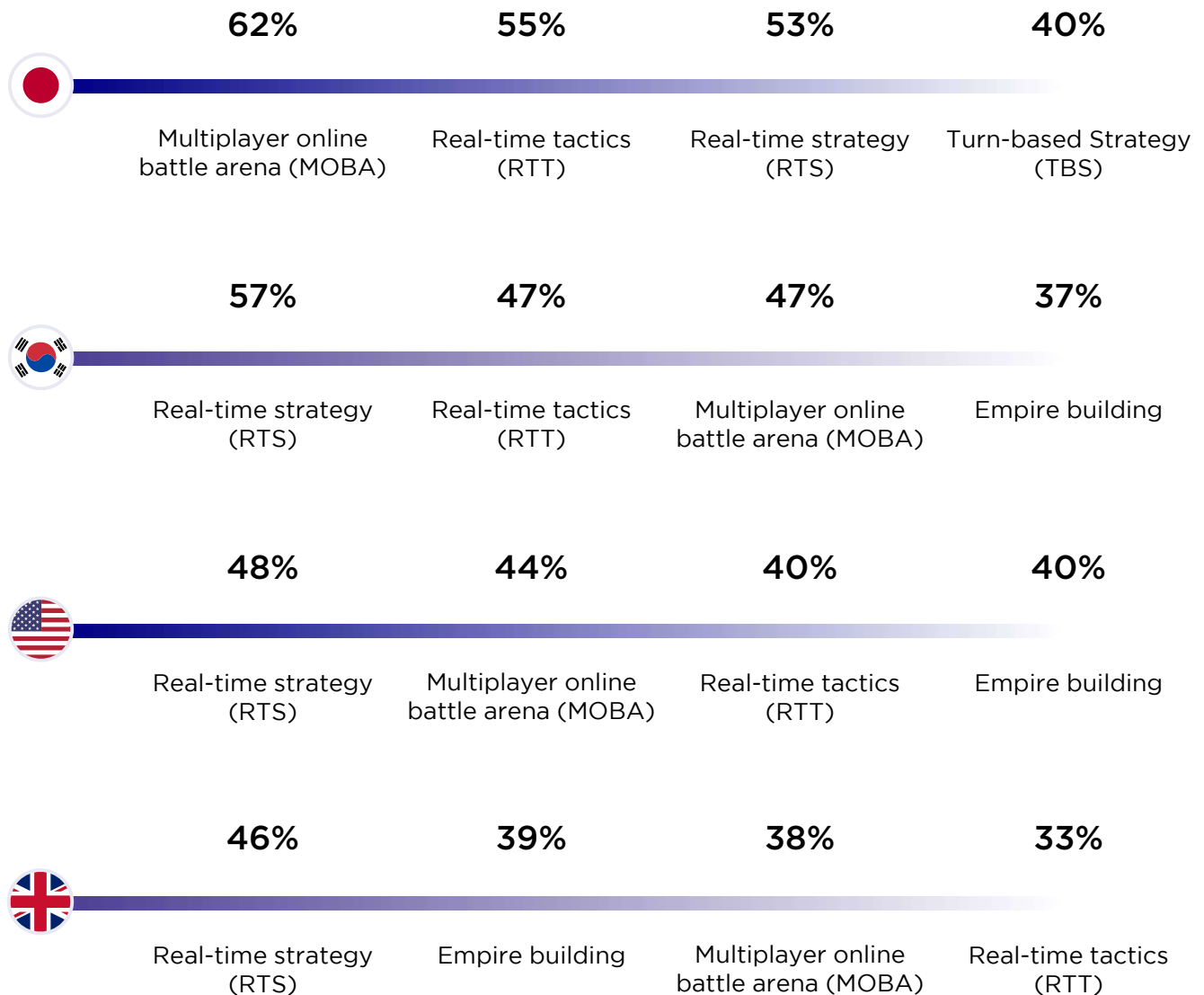
Players in many markets say they churn due to bugs. Therefore, fixing bugs is also the top-cited reason for Strategy gamers to come back, especially in Brazil.

Nostalgia is a popular reason to return in Japan, South Korea, the U.S., and Europe. This is no surprise, as these markets have historic gaming roots going back decades.

Real-Time Strategy Games Are Very Popular in Korea, but MOBA Wins in Japan

Strategy Games: Sub-Genres

TikTok users who play mobile strategy or MOBA games, selected for deep dive



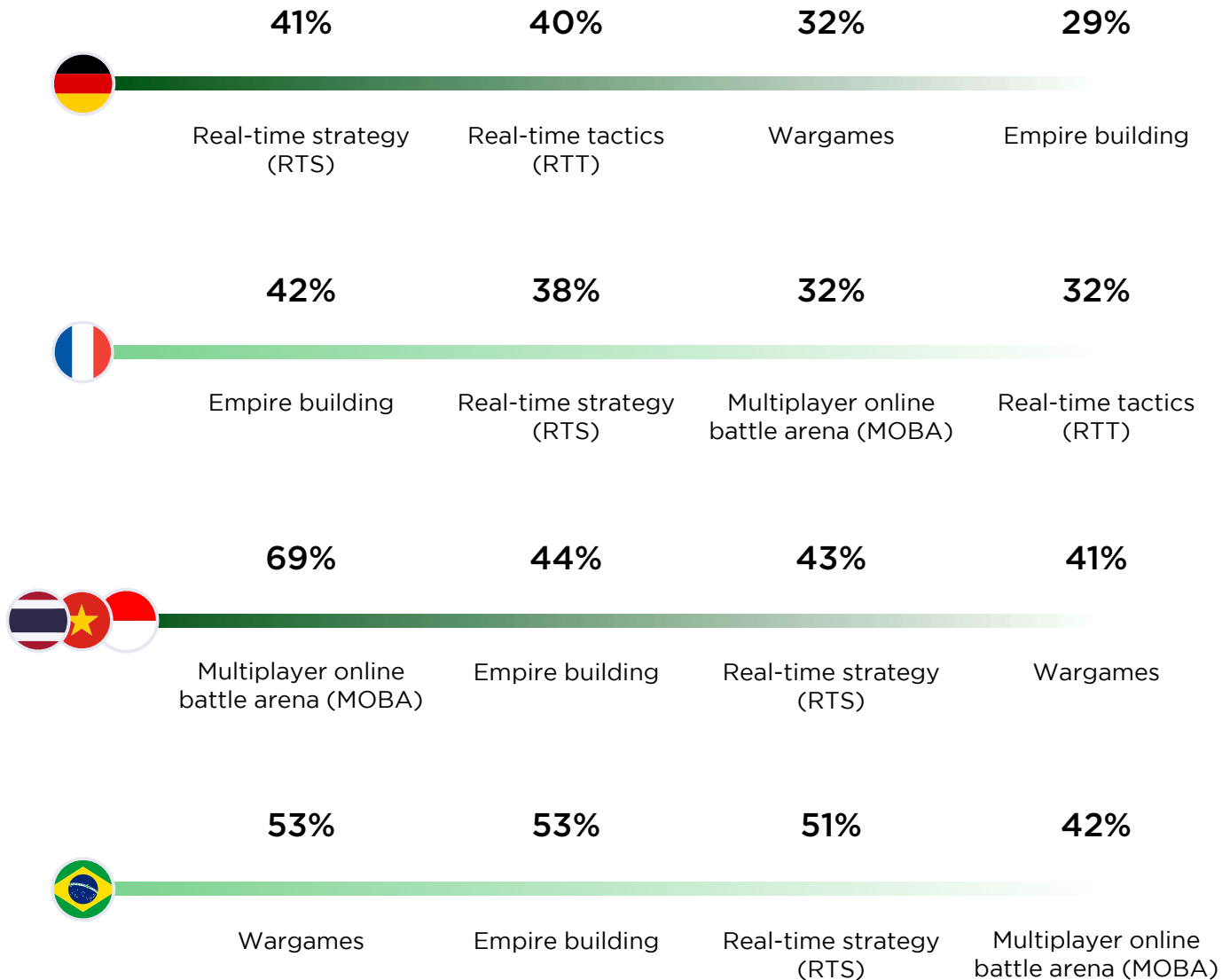
Real-time strategy is the most popular subgenre across these four markets, except for Japan. It is especially popular in South Korea, which is known for its love of RTS titles.

Japan is the only market of these four where RTS isn't the top sub genre and the only market where turned-based strategy is in the top four.

Gamers Have Different Preferences in Each of These Four Markets

Strategy Games: Sub-Genres

TikTok users who play mobile strategy or MOBA games, selected for deep dive



































There is a lot of variation across the markets when it comes to most preferred sub-genres. As is the case in Japan and South Korea, MOBA is very popular in SEA, thanks to Mobile Legends: Bang Bang's prominence in the region.

MOBA is the least popular option in Germany and France. France and Brazil both enjoy empire building, while it's the least popular sub-genre in Japan, Korea, and the U.S. Wargames are notably a top choice in Brazil.

The Realistic Art Style Is the Most Preferred in Every Market

Top Art Styles | Strategy Games

		63% Realistic		55% Cartoonish		54% Anime
		58% Realistic		49% Cartoonish		46% Cute Asian
		61% Realistic		52% Cartoonish		46% Anime
		55% Realistic		48% Cartoonish		42% Abstract
		58% Realistic		37% Cartoonish		31% Abstract
		54% Realistic		40% Anime		32% Cartoonish
		62% Realistic		51% Cute Asian		51% Anime
		76% Realistic		51% Cartoonish		44% Anime



Realistic art styles resonate with TikTok mobile gamers across all markets. The same is true for non-TikTok-using gamers.

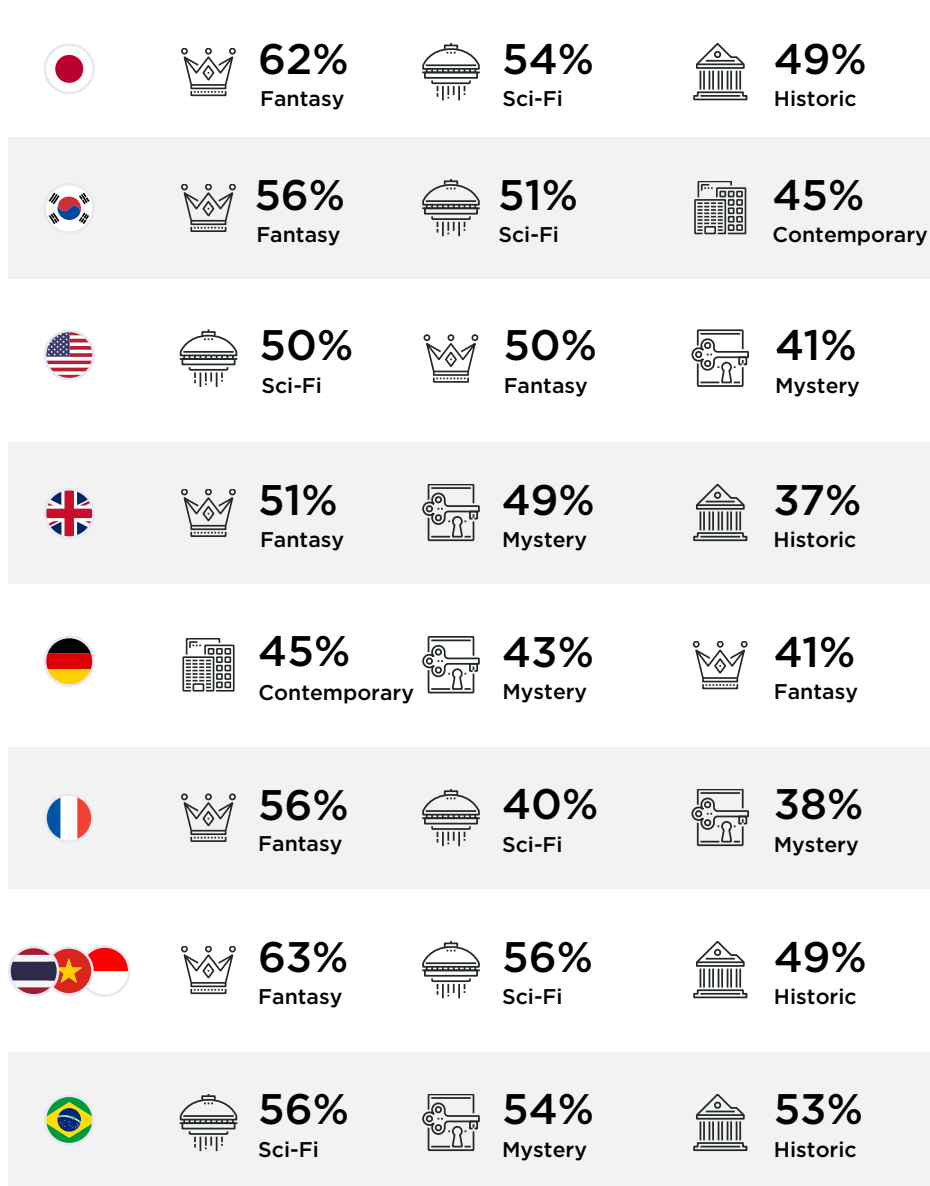


Cartoonish and Anime styles are also very popular in most markets. In the **U.K. and Germany**, gamers also uniquely enjoy abstract styles.

Base: TikTok users who play mobile strategy or MOBA games, selected for deep dive

Fantasy Is the Most Preferred Strategy Setting in Most Markets

Top Settings | Strategy Games



+ Mystery is much more popular among **Western** than **Asian gamers**. In fact, it's not in the top three for any of the Asian markets. Fantasy and sci-fi prevail in the East.

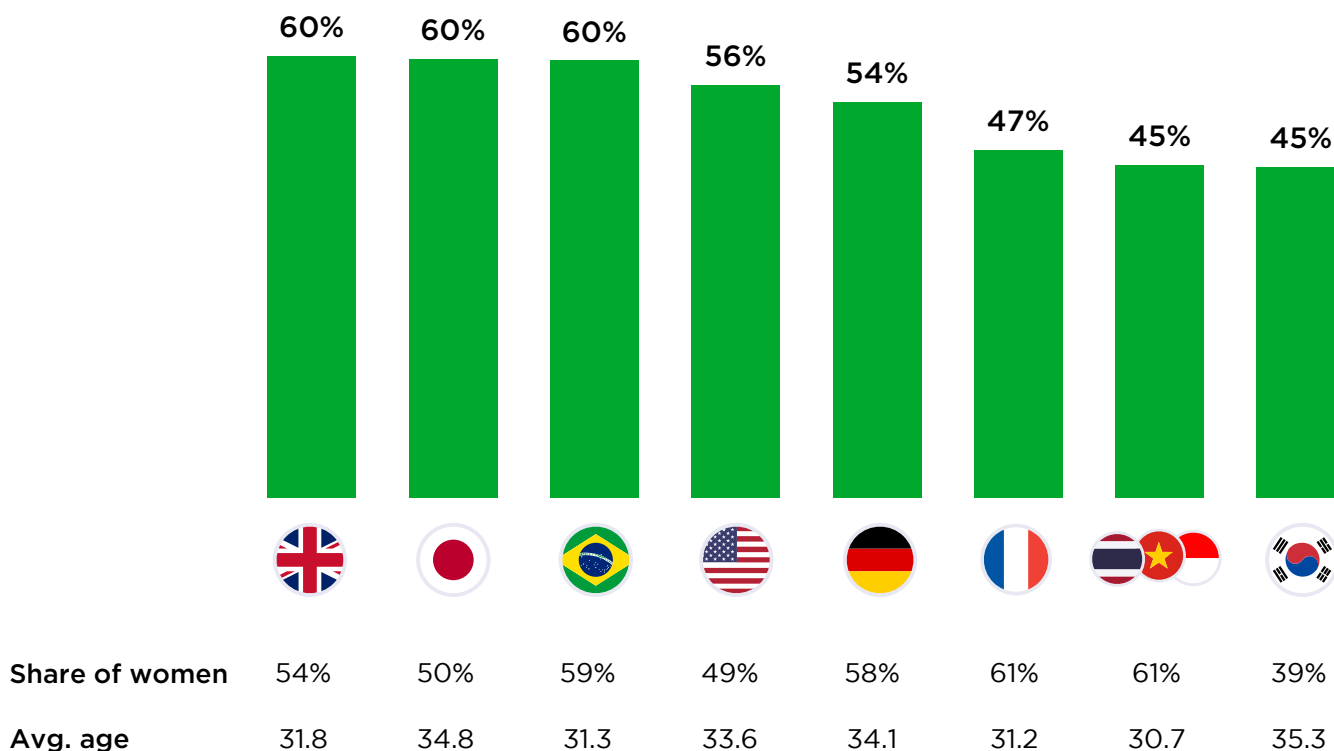
+ **Germany** is the only market where gamers prefer a contemporary setting. In **Brazil** and the **U.S**, sci-fi is relatively more popular than in other markets.

Base: TikTok users who play mobile strategy or MOBA games, selected for deep dive

Puzzle Games Are Equally Popular in the U.K., Japan, and Brazil

Puzzle Games: How Many Play and Who Plays?

Base: TikTok mobile gamers



Japanese TikTok Mobile Gamers Are Much More Likely to Play Puzzle Games Than Non-Users.

In Japan, 60% of TikTok users who play mobile games play puzzle games. This is compared to just 42% of gamers who don't use TikTok. France is the only country where this trend is reversed. It is worth noting that there are puzzle games in Japan that include core gaming mechanics, appealing to core gamers (as well as casual ones).



Women Make Up Lion's Share of TikTok's Puzzle Gamers in Most Markets.

In almost every market except for the U.S. and South Korea, women make up at least half of all puzzle gamers. In France and SEA, this share jumps to 61%. Korean puzzle gamers also skew older than in any other market.

Puzzle Players Play to Relax but Pay to Progress



Reasons to Play

- 41% To relax/unwind
- 37% To pass time
- 31% To solve problems tactically
- 28% To escape from everyday life
- 28% To get as high level as possible

Base: TikTok users who play mobile puzzle or match games, selected for deep dive



The top reasons for playing puzzle games are to relax and pass the time (more than any other genre). Over half of France's puzzle gamers play the genre to unwind. Only 33% do so in the **U.K. and Japan**.

Instead, 46% of puzzle players in **Japan** play the genre for a sense of achievement—far higher than the average of 26%. Less casual puzzle games, like Puzzle & Dragons, are popular in Japan.



Reasons to Pay

- 37% Complete a level quicker
- 37% To help you when you get stuck
- 32% Unlock extra playable content
- 29% Take advantage of a sale/offer
- 28% Personalize your character or things you build in-game

Base: TikTok users who play mobile puzzle or match games, selected for deep dive

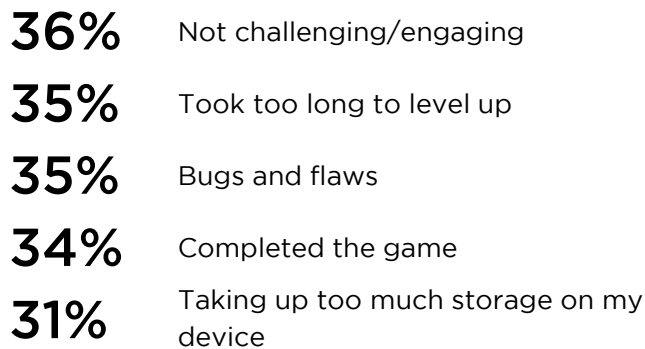


Meanwhile, the top reasons for *paying* in puzzle games were related to progression. As cosmetics and personalization are less of a factor in many puzzle titles, this makes sense.

Paying to unlock content is the #3 reason to pay across all markets, but gamers in emerging markets are especially drawn to this. Monetizing progression can be lucrative in puzzle games on mobile.

Challenge Is a Major Reason for Churn; New Content and Fixes Bring People Back

Why do Players Churn?

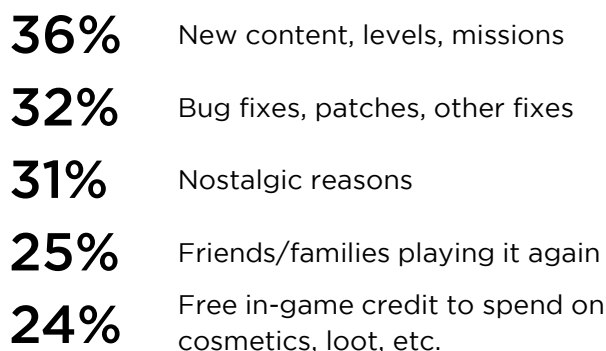


Base: TikTok users who play mobile puzzle or match games, selected for deep dive



Taking too long to level up seems to be a frustration for many puzzle players. While this makes some players churn, it triggers others to spend. This means it is vital for puzzle developers to strike the right progression balance.

Why do Players Return?



Base: TikTok users who play mobile puzzle or match games, selected for deep dive



As is the case with many genres, new content is the main way to re-engage lapsed puzzle players—particularly in **Germany**.

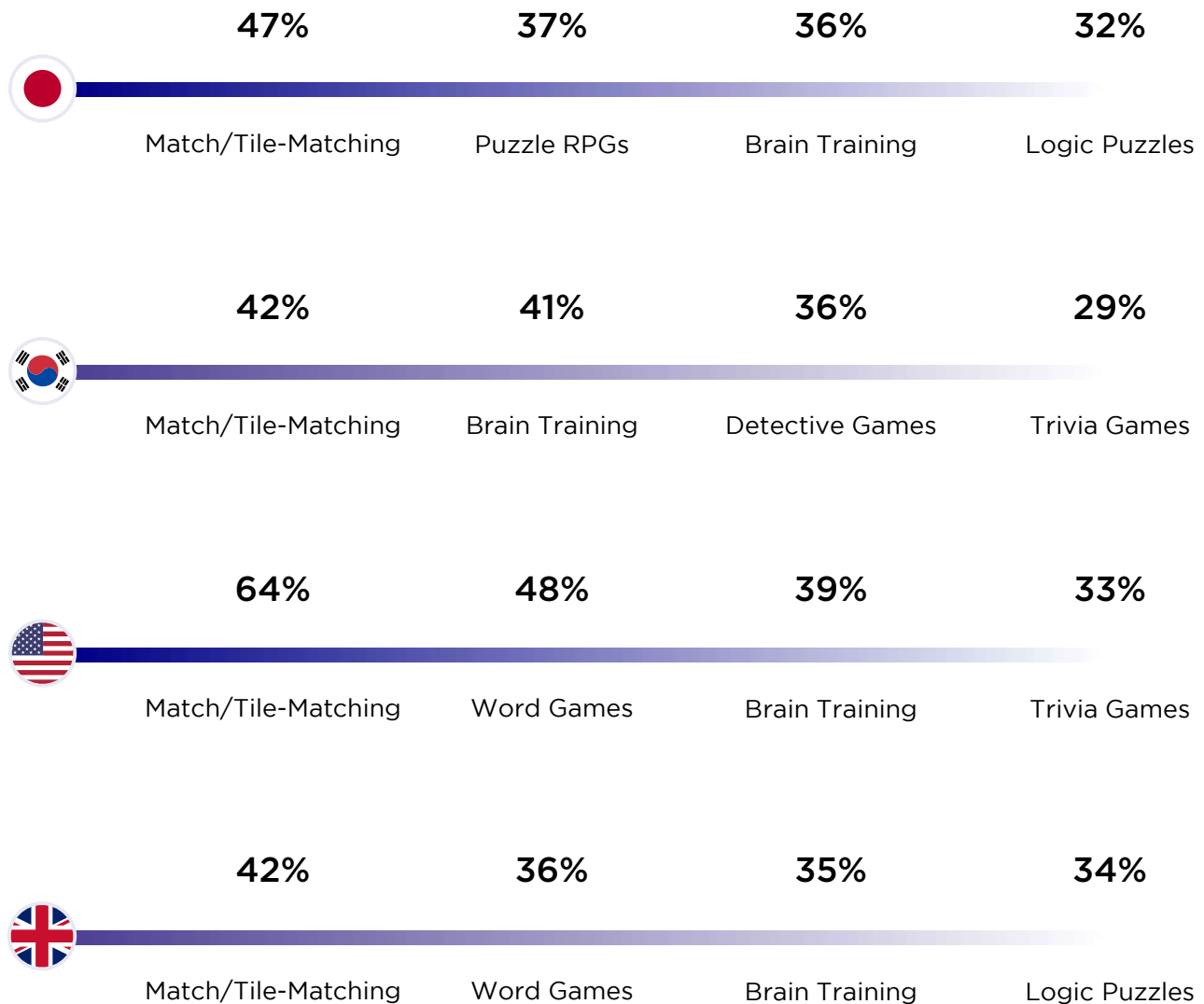
Fixing bugs is also important for winning puzzle players back. As many puzzle games have social elements (leaderboards), it is unsurprising to see that many are drawn back by friends and family. The U.S., where social-heavy Candy Crush

dominates, is especially receptive to this. Puzzle players are a little less likely to return due to new content (vs. players of other genres). This makes sense, as puzzle games often already have many levels and gameplay is often less varied.

Tile Matching Is the Most Popular Sub-Genre in Each Market

Puzzle Games: Sub-Genres

TikTok users who play mobile puzzle or match games, selected for deep dive



TikTok gamers in the U.S. show the biggest affinity for match games, with a massive two-thirds enjoying this subgenre. They are also far more likely to play word games than any other gamers. This subgenre is only popular in the European markets.

Japan is the only market in which Puzzle RPGs are very popular, taking the second spot. Brain training is relatively popular in each market.



Strategy



Puzzle



Casual/
Arcade

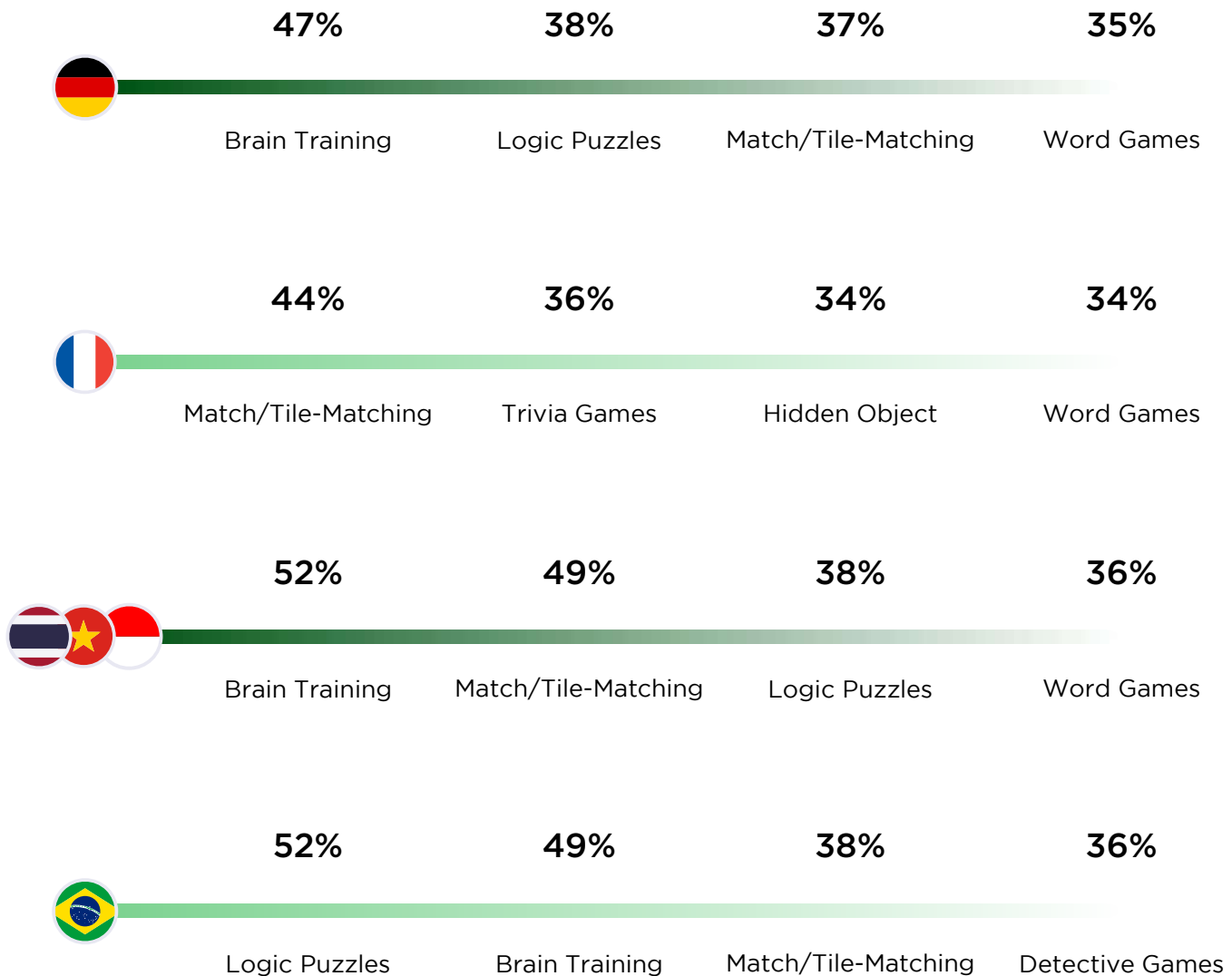


Role
Playing

France Is the Only Market Where Trivia and Hidden Object Games Are Popular

Puzzle Games: Sub-Genres

TikTok users who play mobile puzzle or match games, selected for deep dive



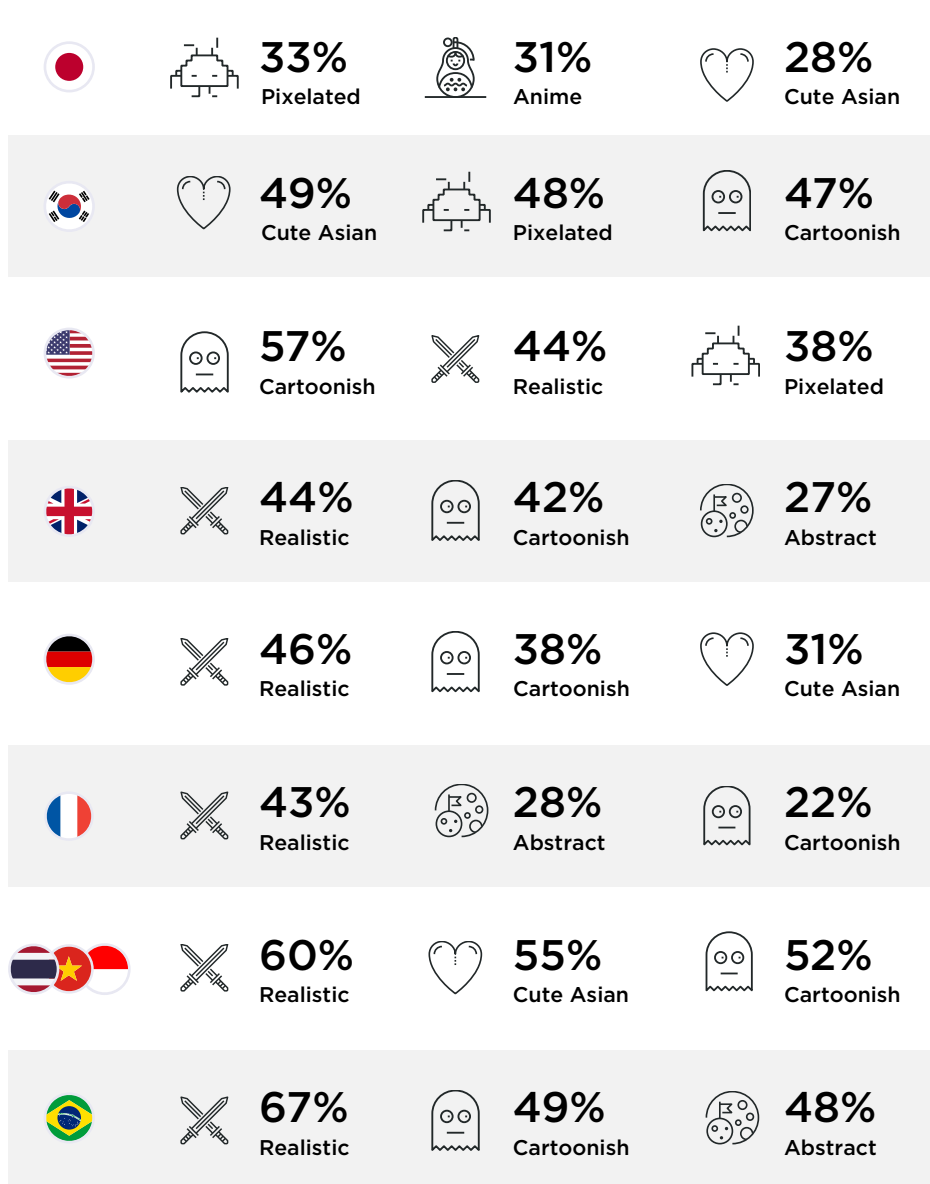
There is a lot of variation across the markets when it comes to puzzle sub-genres. Brain training is the most popular in Germany and SEA but doesn't feature on the favorite list in France, where trivia and hidden object are preferred.

Brazil is the only market where logic puzzles is the number one sub-genre. It's also the only market of these four in which detective games feature as a favorite.



Realistic Art Styles Are Dominant, Except in Japan and Korea

Top Art Styles | Puzzle Games



































Realistic art styles are popular with TikTok mobile gamers in every market, except **Japan and South Korea** where it does not feature in the top three.

While Cartoonish styles are generally popular, only 17% of gamers in Europe favor Anime. Cute Asian is a top choice in each of the Asian markets.

Base: TikTok users who play mobile puzzle or match games, selected for deep dive

Fantasy or Mystery Are the Top Settings in All Markets

Top Settings | Puzzle Games

	 51% Fantasy	 36% Contemporary	 24% Mystery
	 57% Fantasy	 45% Mystery	 37% Contemporary
	 53% Fantasy	 44% Mystery	 34% Contemporary
	 37% Mystery	 34% Fantasy	 27% Sci-Fi
	 46% Mystery	 42% Contemporary	 36% Fantasy
	 40% Mystery	 37% Fantasy	 30% Contemporary
	 60% Fantasy	 47% Sci-Fi	 45% Mystery
	 55% Mystery	 49% Fantasy	 40% Historic



Fantasy takes the top spot in all the **Asian markets and in the U.S.** Mystery is the top settings choice for the other **Western markets.**



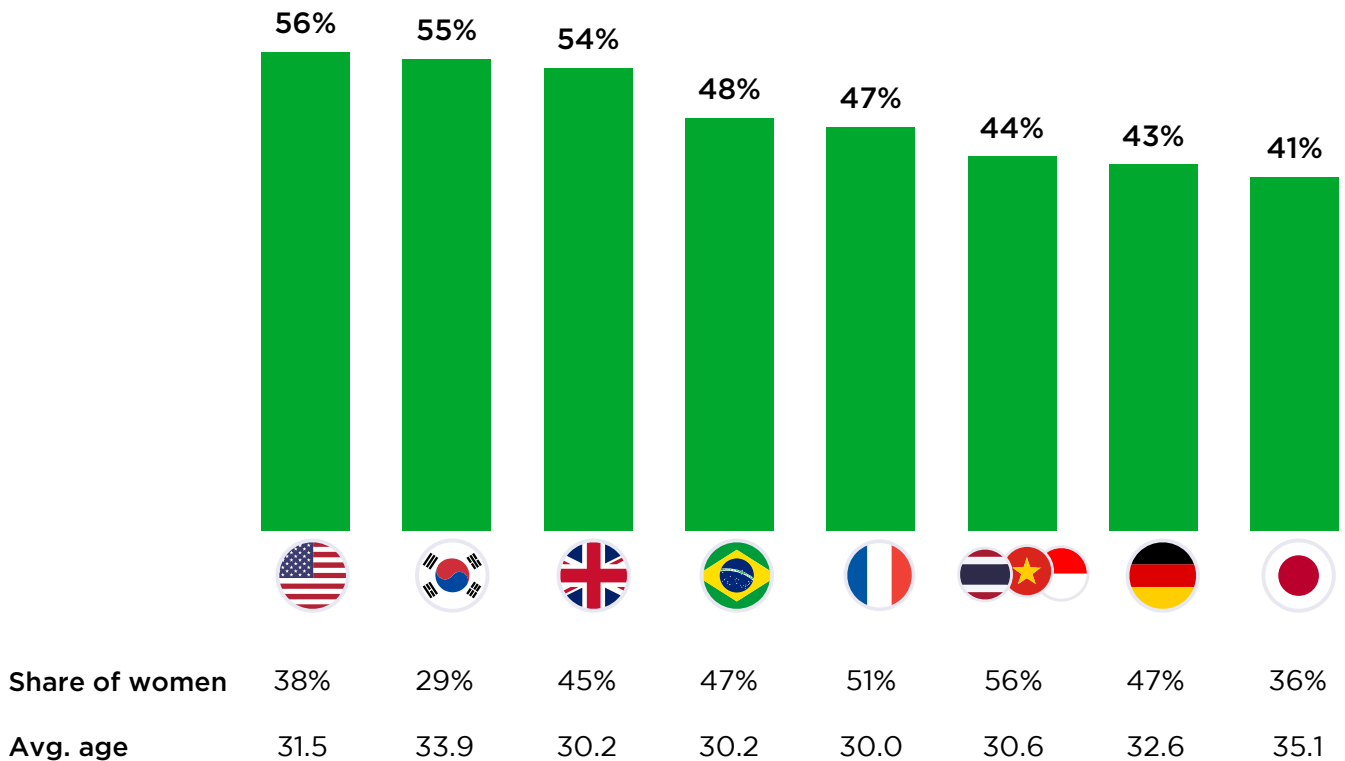
Sci-fi is only in the top three for gamers in the **U.K. and SEA.** **Brazil** is the only market in which historic settings are popular.

Base: TikTok users who play mobile puzzle or match games, selected for deep dive

Casual Games Do Best in Mature Gaming Markets

Casual/Arcade Games: How Many Play and Who Plays?

Base: TikTok mobile gamers



Casual Games Are Most Popular in the United States.

This genre performs better in the U.S. than any other market with 56% of TikTok gamers playing it. Among all mobile gamers in the U.S., the share is 45%; the highest overall, together with the U.K.

Many gamers in Western markets associate mobile with casual and arcade games, whereas emerging markets tend to play more core genres on mobile. This might explain why TikTok gamers in mature markets skew toward casual.



SEA and French Gamers Skew Younger and Female.

In SEA and France, more than half of casual/arcade gamers are women. The average age of around 30 is also lower than in most of the other markets. This is in stark contrast to South Korea and Japan where these gamers are overwhelmingly male and closer to 34 and 35, respectively.

Casual and Arcade Gamers Play to Relax but Pay to Enrich Their Playing Experience



Reasons to Play

- 37%** To relax/unwind
- 29%** To get as high level as possible
- 28%** For calming/relaxing gameplay
- 27%** To escape from everyday life
- 26%** To pass time

Base: TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive



Casual and arcade games tend to feature basic and accessible gameplay mechanics, so it's unsurprising to see that relaxing is the top motivator for these gamers.

High scores and leader boards are also inherent to arcade-style games, so it makes sense to see reaching a high level as the #2 reason to play. **The U.S.** is particularly driven by this reason.



Reasons to Pay

- 38%** Complete a level quicker
- 36%** Unlock extra playable content
- 31%** Personalize your character
- 30%** To help you when you get stuck in the game
- 28%** Gain an advantage over other players

Base: TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive



Progression is also a key reason to spend money on casual and arcade games across all markets, especially in the **U.S.** This makes sense, given the American market's reasons for playing.

TikTok mobile gamers across all the markets pay to unlock extra playable content, but less so in **Germany**. Instead, German gamers are more likely to pay for randomized items or rewards.



Strategy



Puzzle



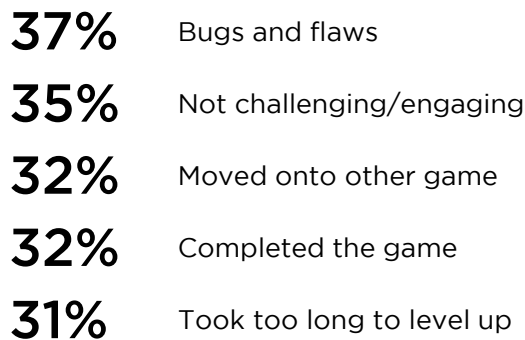
Casual/
Arcade



Role
Playing

Bugs Cause Casual and Arcade Players to Churn; Content and Fixes Bring Them Back

Why do Players Churn?

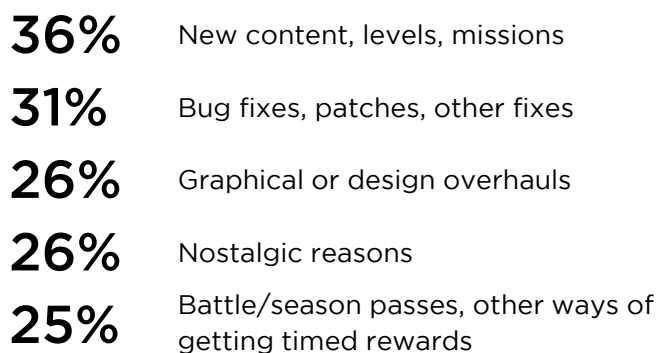


Base: TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive

Frustration and taking too long to progress are the top reasons that gamers in **Japan** churn.

Arcade and casual gamers in **the U.S.** are likelier than any other market to churn because they don't have time to play anymore.

Why do Players Return?



Base: TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive

Gaming's history is rooted in arcades and high-score gameplay. "Nostalgic reasons" taking the #4 spot for bringing casual and arcade players back makes sense.

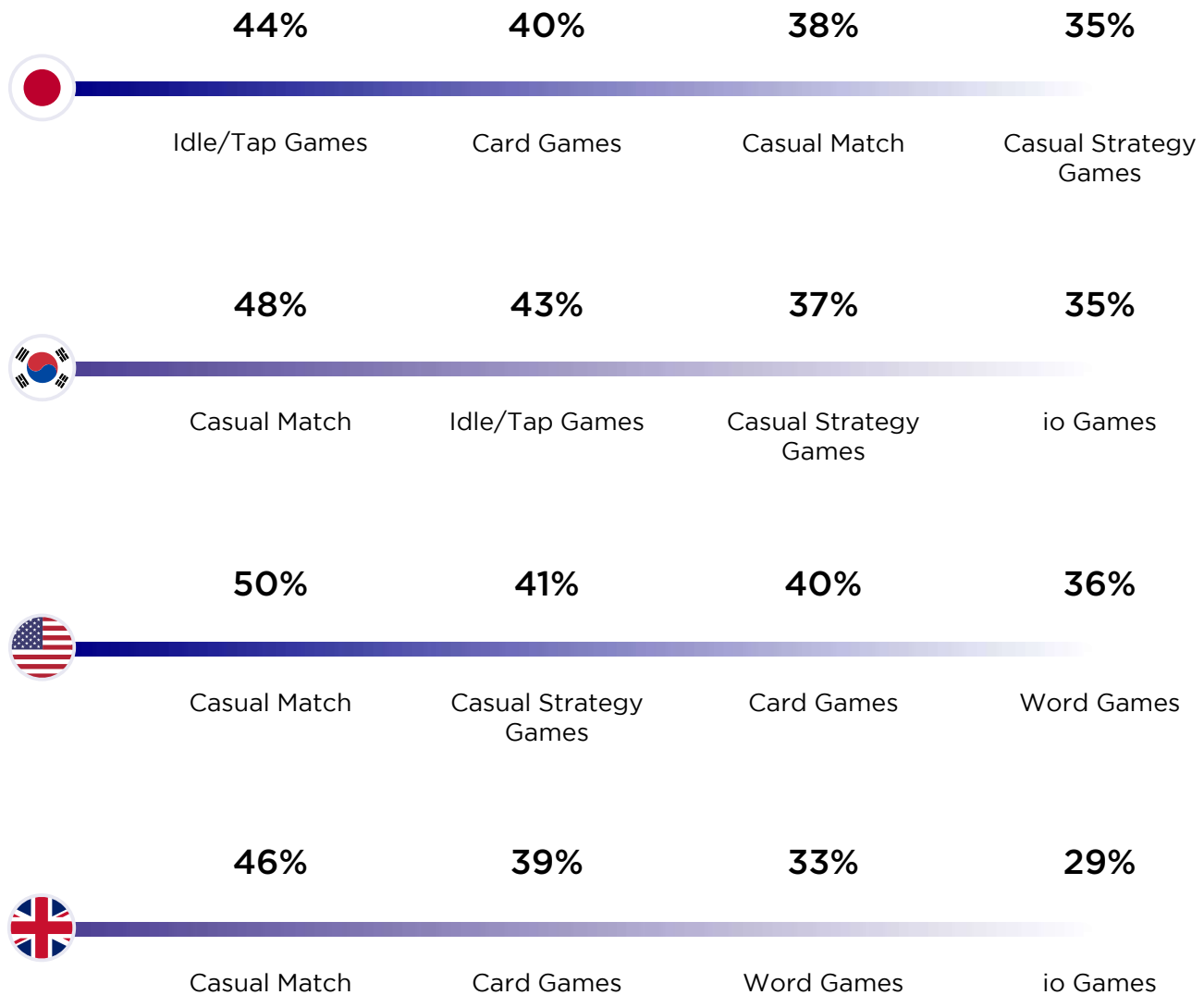
Almost a third of TikTok gamers stopped playing casual games because they finished them. Therefore, it is no surprise to see new content as the top reason to return in all markets covered except in Germany. Here, gamers are

more likely to be drawn back by free in-game credit to spend on cosmetics, loot, or other in-game items. This complements Germany's top reason to pay (trying their luck at getting a random reward or item they want).

Idle/Tap Games Are Popular in Asia, With Word Games Popular in the U.S. and the U.K.

Casual/Arcade Games: Sub-Genres

TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive



Gamers in every market except for Japan prefer the casual match sub-genre. In Japan and South Korea, idle/tap games are also very popular. These do not feature in the U.K. or the U.S.

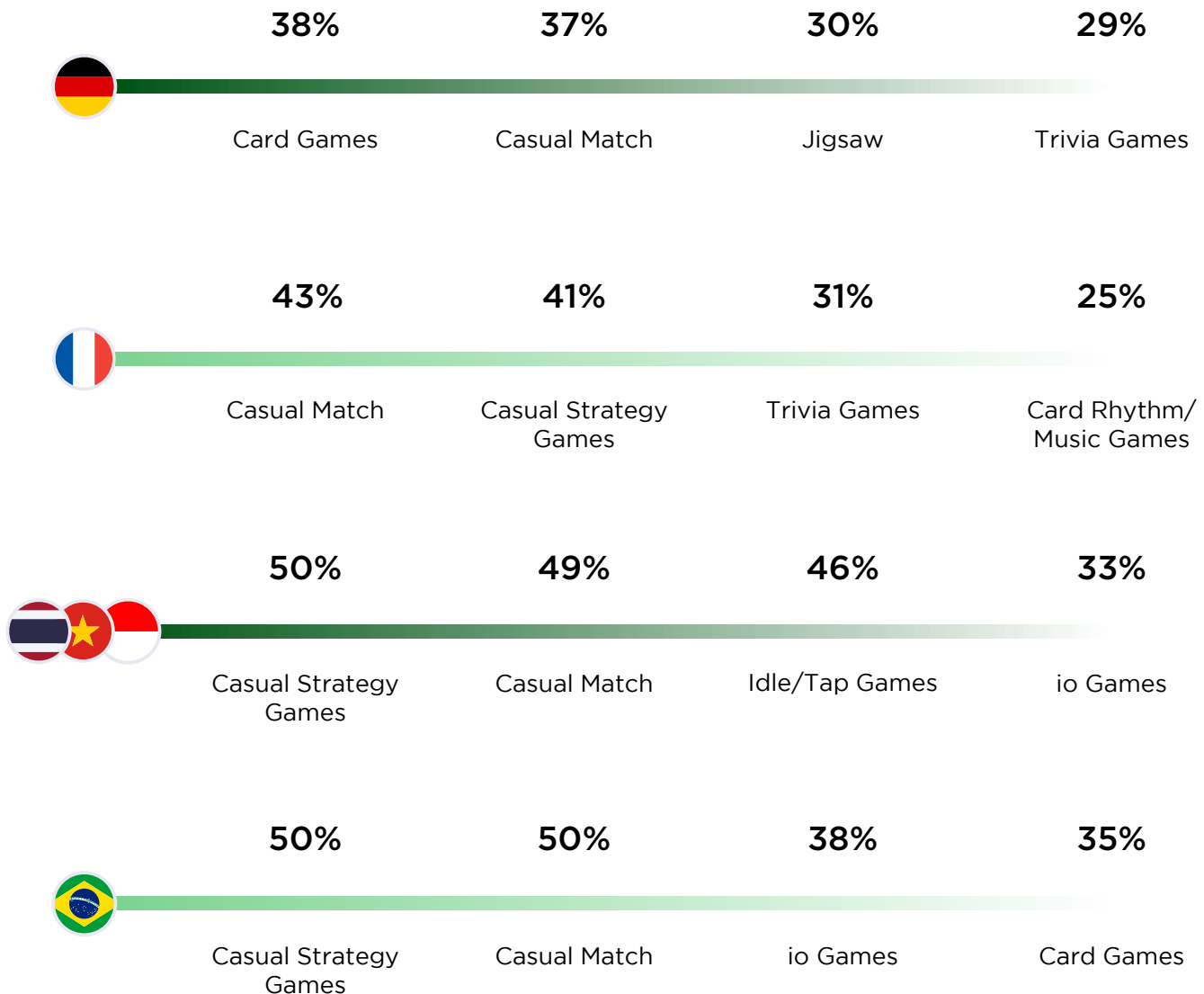
Conversely, word games are a popular sub-genre in both the U.S. and the U.K. but not in the Asian markets. io Games are only popular in South Korea and the U.K.



Gamers Have Different Preferences in Each of These Four Markets

Casual/Arcade Games: Sub-Genres

TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive



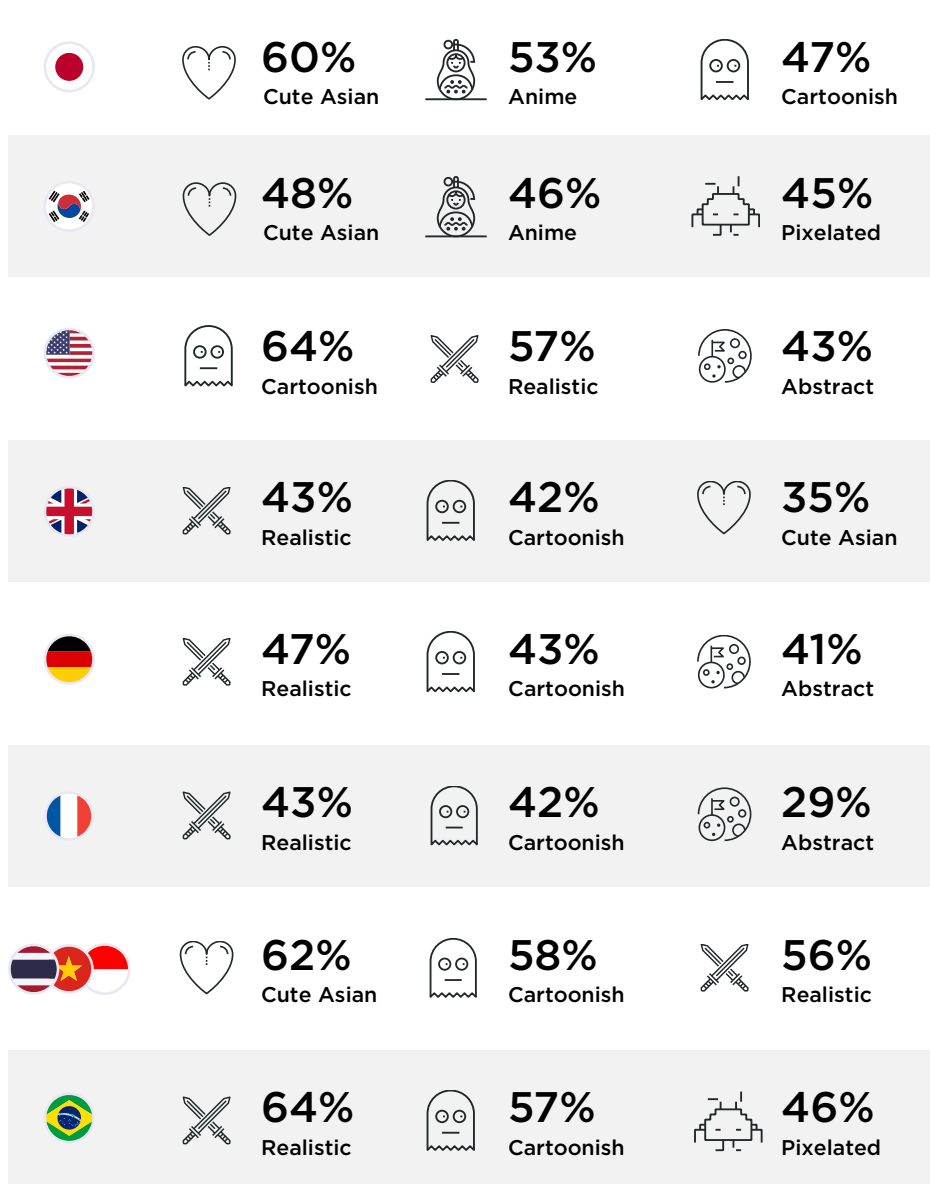
Germany is one of the only markets studied where casual strategy games are not a preferred sub-genre, while jigsaw games are notably popular here. France also has unique preferences, with card rhythm/music games being among its most popular sub-genres.

SEA and Brazil have similar preferences, enjoying casual sub-genres and io games. Like in the other Asian markets (Japan and South Korea), idle/tap games are popular in SEA.



The East Prefers Cute Asian Art Styles; The West Is Interested in Realism

Top Art Styles | Casual/Arcade Games



Cute Asian is the preferred art style in all **Asian markets** covered. Many local publishers in, and targeting these markets, use this art style.

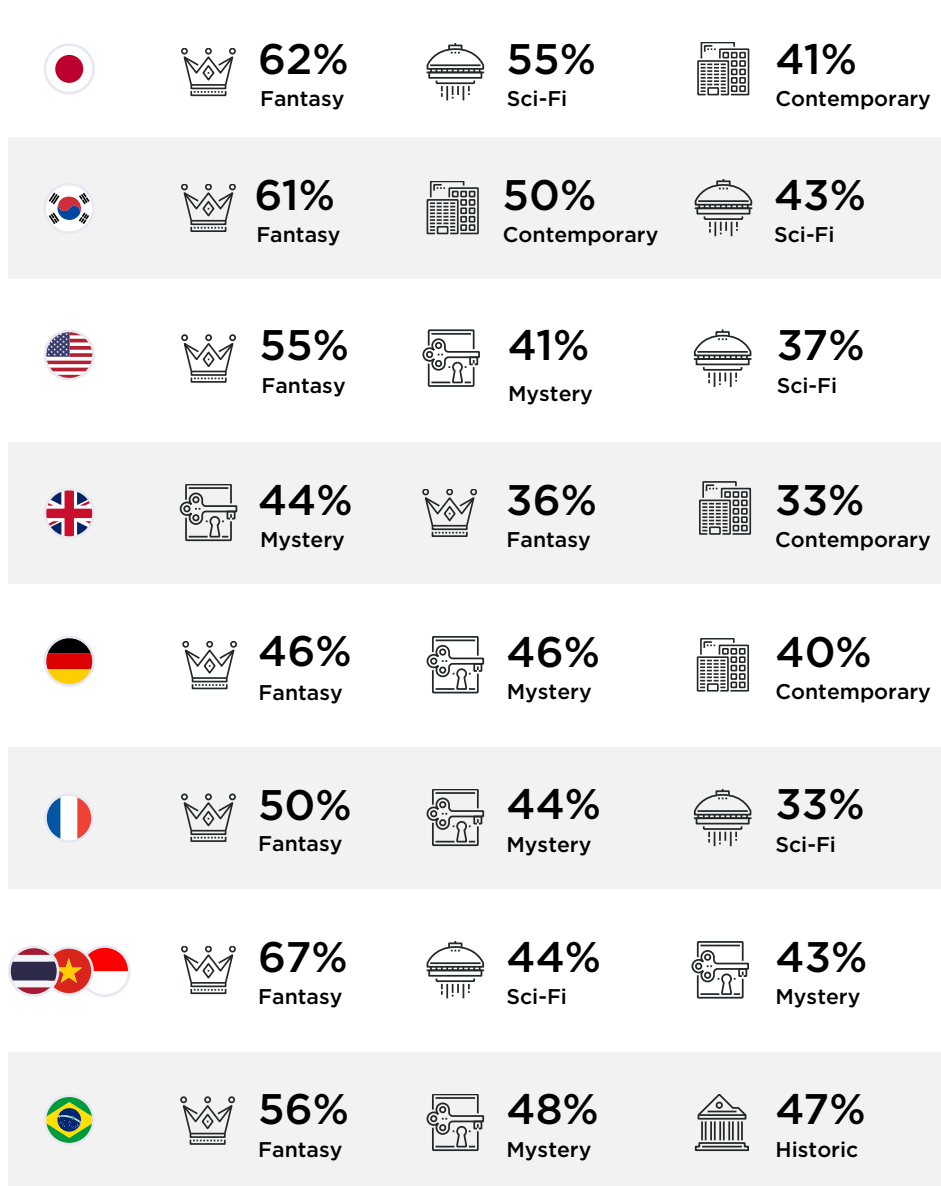


Meanwhile, the **Western markets** are more drawn to realistic and cartoonish art styles in their casual and arcade games.

Base: TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive

Fantasy and Mystery Are the Preferred Themes Across the Markets Covered

Top Settings | Casual/Arcade Games



Fantasy is the most popular casual and arcade setting in all markets except the **U.K.**, where mystery takes the top spot. Mystery tends to be less popular in the **Asian markets**.

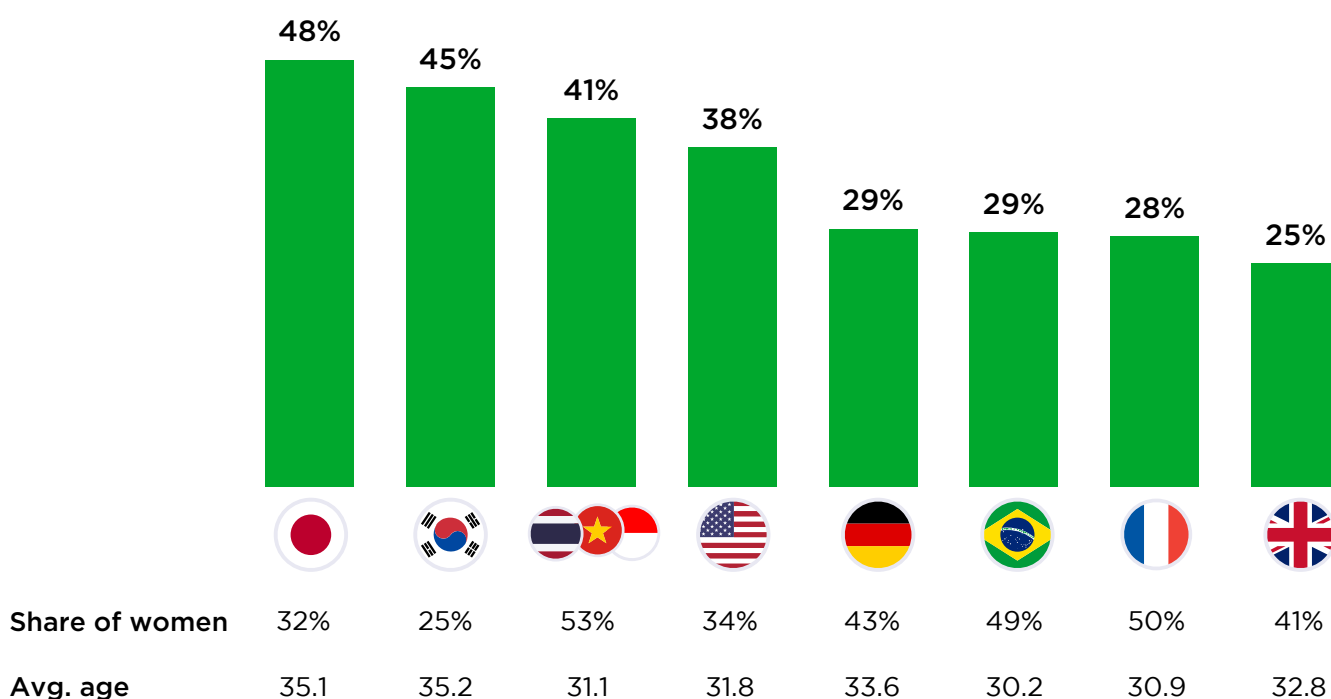
SEA is far more enthusiastic about fantasy than any other setting. Sci-fi and contemporary is another top choice across many markets.

Base: TikTok users who play mobile arcade, hyper casual, or idle games, selected for deep dive

Role Playing Games Are Most Popular With Asian Gamers

Role Playing Games: How Many Play and Who Plays?

Base: TikTok mobile gamers



TikTok Mobile Gamers in the West Are Less Likely to be Mobile RPG Players.

Gamers in Asian markets are far more likely to be playing RPG titles, especially those in Japan and South Korea. In Japan, half of TikTok mobile gamers and 38% of non-users are playing the genre. This is a big contrast to 25% and 20% in the U.K., respectively. The most popular mobile games in Japan are often RPGs, and the genre tends to be more diverse.

Demographics of RPG Gamers in SEA Are More Diverse.

In SEA, the biggest share of RPG gamers are women. It's the only market where this is the case. In France and Brazil, it's roughly half. As with other genres, Japan and South Korea have a smaller share of women and an older average age.

RPG Gamers Play for Immersion but Pay for New Content, Progression, and Personalization



Reasons to Play

35%	To get immersed in another world
32%	To relax/unwind
30%	To escape from everyday life
29%	To play as another character/person
29%	To be creative

Base: TikTok users who play mobile role-playing games, selected for deep dive



Role-playing games often include strong exploration and narratives, taking place in fantastical fictional settings. Immersion being the #1 reason to play is somewhat expected. 57% of **Japan's** TikTok-using RPG players chose immersion as their top motivator.

To “relax/unwind” and to “escape from everyday life” are also top answers across most markets. This may be tied to players immersing themselves in RPG worlds. **Japan** and **Korea** are more serious about RPGs and place relaxation lower on the list.



Reasons to Pay

41%	Unlock extra playable content
39%	Personalize your character
31%	Trying luck getting a random reward/item
31%	Take advantage of a sale/offer
31%	Get access to seasonal content

Base: TikTok users who play mobile role-playing games, selected for deep dive



All markets cite extra content as a reason for paying in RPGs, especially in the emerging markets. Trying to get random rewards/items is also a top answer. Popular RPGs like Genshin Impact use this “gacha” monetization mechanic.

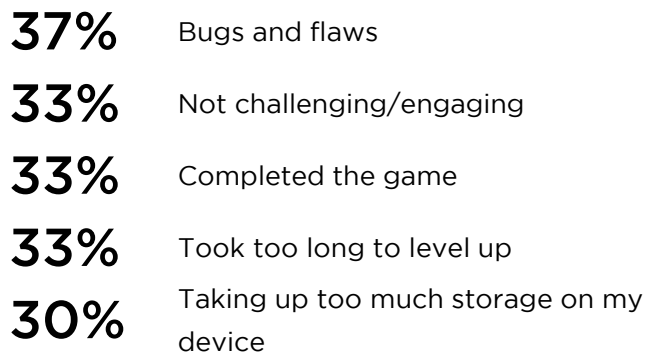
Paying for personalization is unsurprisingly a top choice, as players often like to modify their avatar to fit the role they have chosen to play.

Japan and **South Korea** are more likely to pay to progress when they are stuck in an RPG.



Lack of Engagement and Challenge Churns RPG Players, New Content Can Bring Them Back

Why do Players Churn?

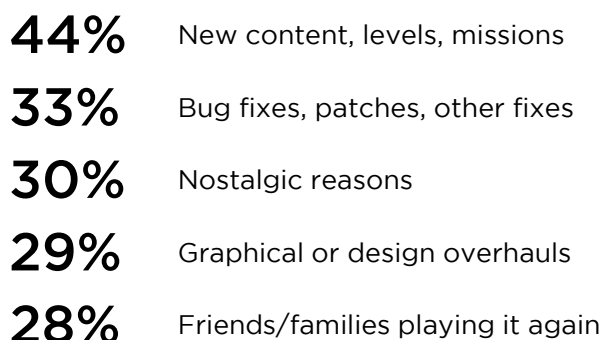


Base: TikTok users who play mobile role-playing games, selected for deep dive

RPG games are all about immersion, so it is unsurprising to see lack of engagement or challenge appearing at #2

Lack of challenge and engagement scored especially highly in **South Korea** and **SEA**.

Why do Players Return?



Base: TikTok users who play mobile role-playing games, selected for deep dive

New content unanimously brings players back across all markets. This is no surprise, as the #3 reason for churning is having completed the game

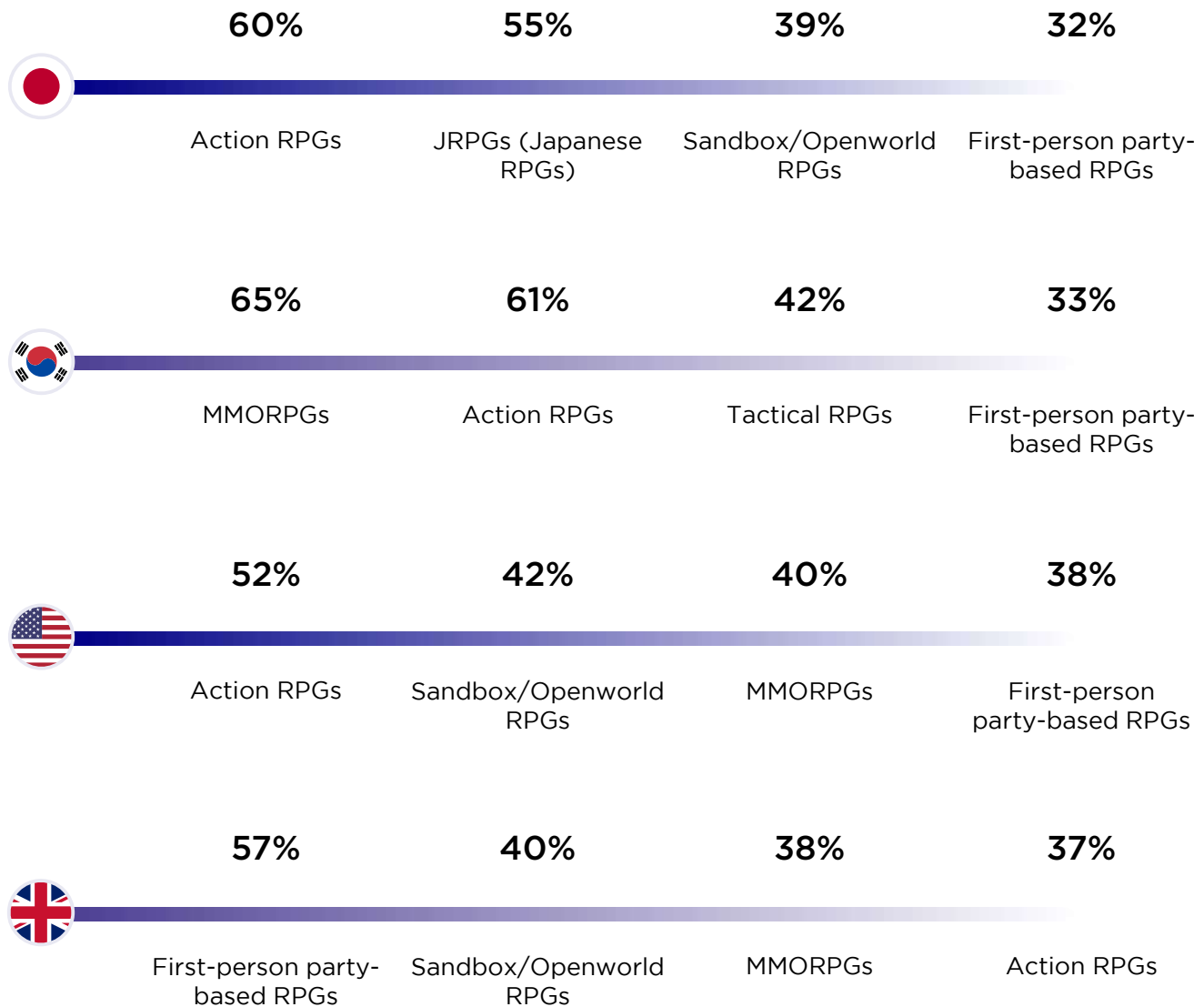
Nostalgia is the #2 reason in both Japan and Korea, two markets with longstanding ties to RPG development and fandom. Relatively speaking, nostalgia is less of a factor in the European markets, where people stopped

playing as they were simply done with the game. Fixing bugs is the #2 reason to return across all markets, but Brazil again brings up the average with 56% of its players returning due to fixes.

First-Person Party-Based RPGs Are Much More Popular With Gamers in the U.K.

Role Playing Games: Sub-Genres

TikTok users who play role-playing games, selected for deep dive



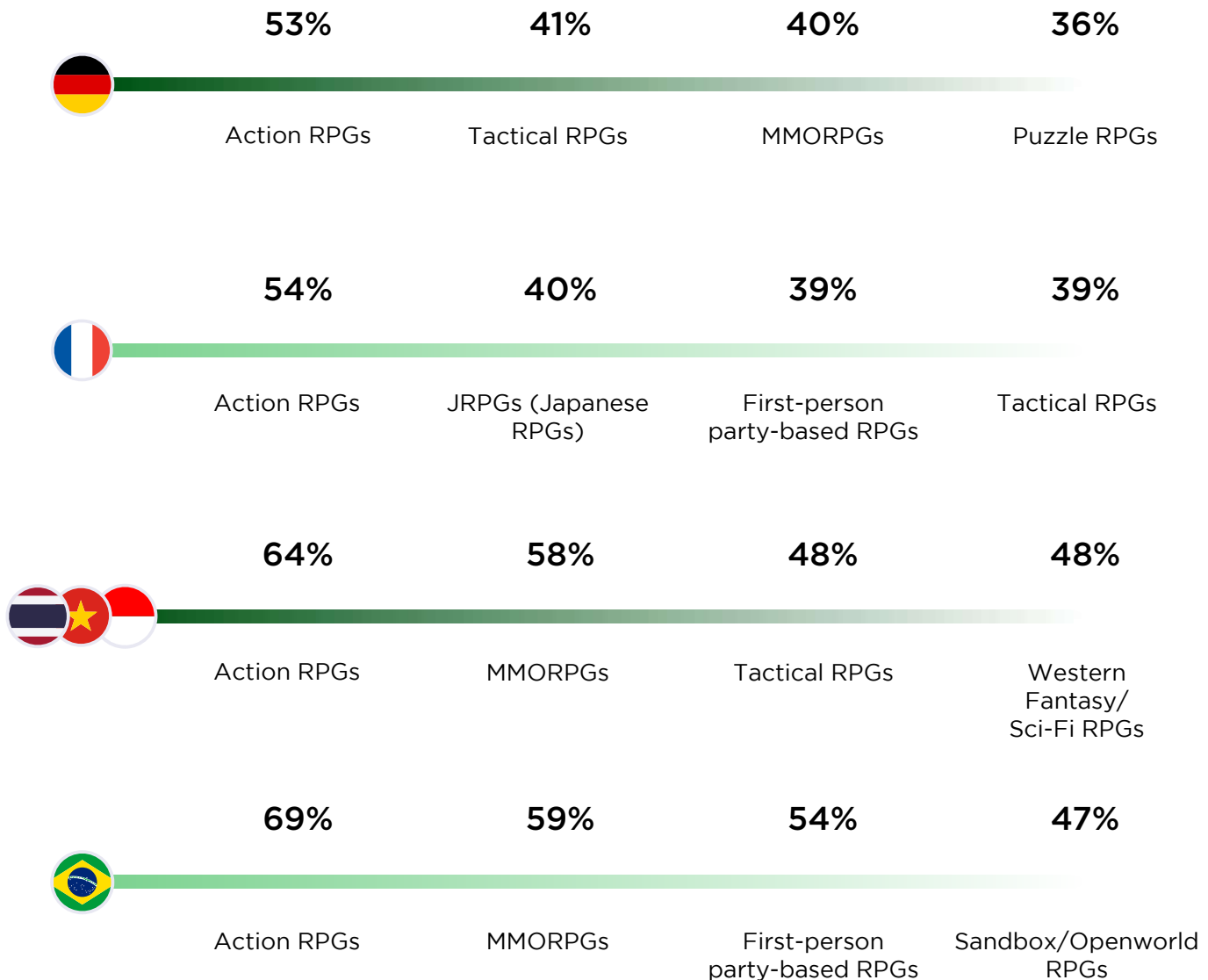
Action RPGs are either the first or second choice in each market, except for the U.K. where they are fourth. First-person party-based RPGs are notably the most popular sub-genre for U.K. gamers.

Japanese RPGs are the second most popular sub-genre in Japan with more than half of its gamers playing them. South Korea is the only market in which sandbox games are not a favorite.

Action RPGs Are the Top Choice in Every Market; Japanese RPGs Are Popular in France

Role Playing Games: Sub-Genres

TikTok users who play role-playing games, selected for deep dive

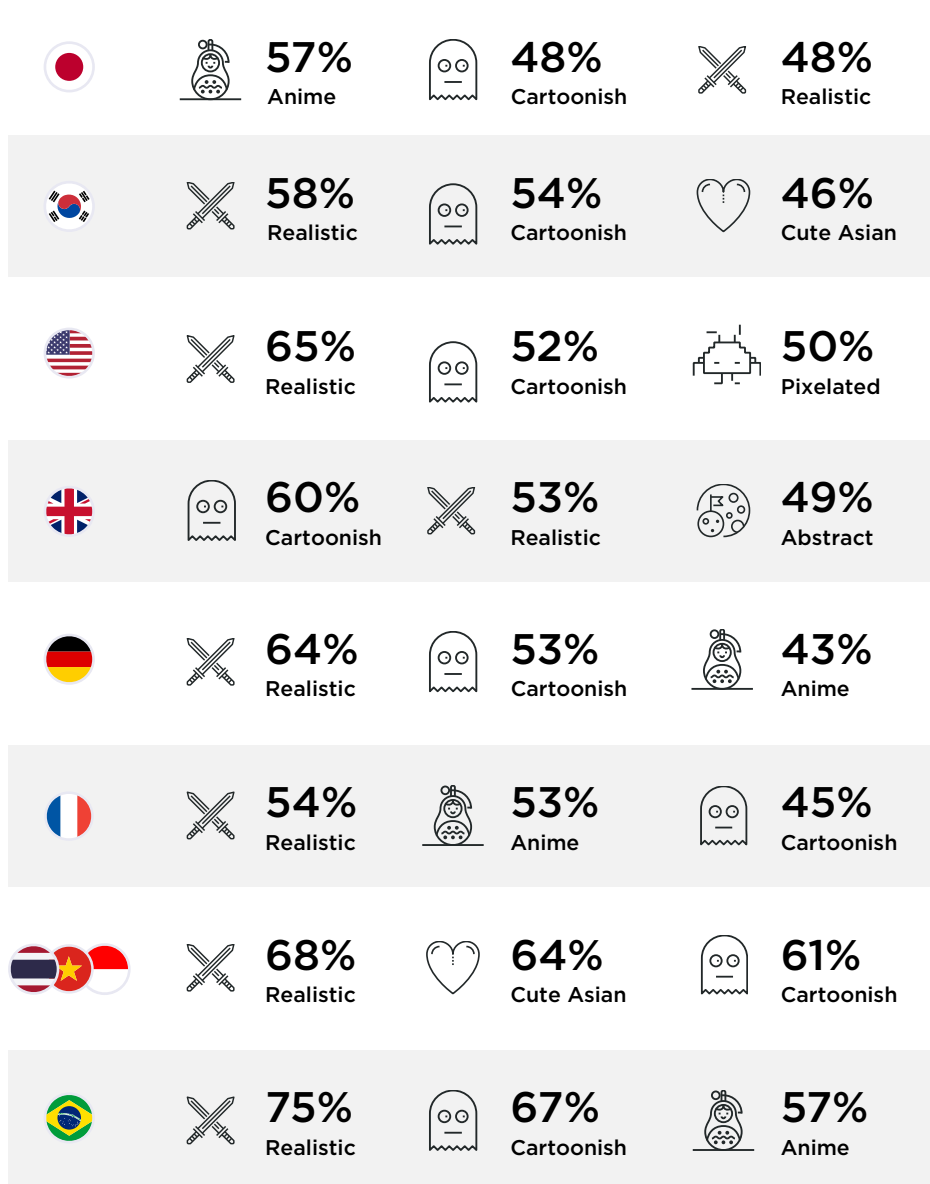


While action RPGs are popular in each of these markets, there are some interesting variations outside of the top spot. France is the only market outside of Japan in which Japanese RPGs are popular, and puzzle RPGs are only popular in Germany,

Similar to gamers in Japan, the U.S., and the U.K., gamers in Brazil also enjoy sandbox RPGs. But the genre is not popular in any of the other markets. SEA is the only market in which Western fantasy/sci-fi RPGs are featured.

Realism and Cartoonish Art Styles Reign for RPGs, but Japan Prefers Anime Styles

Top Art Styles | Role Playing Games



Realism and cartoon are the top art style answers across all markets. This complements the idea that people play RPGs for immersion and escapism.

Anime is the #1 art style in **Japan**, where anime mobile RPGs Genshin Impact and Fate/Grand Order are very popular for spending and engagement.

Base: TikTok users who play mobile role-playing games, selected for deep dive

Strategy

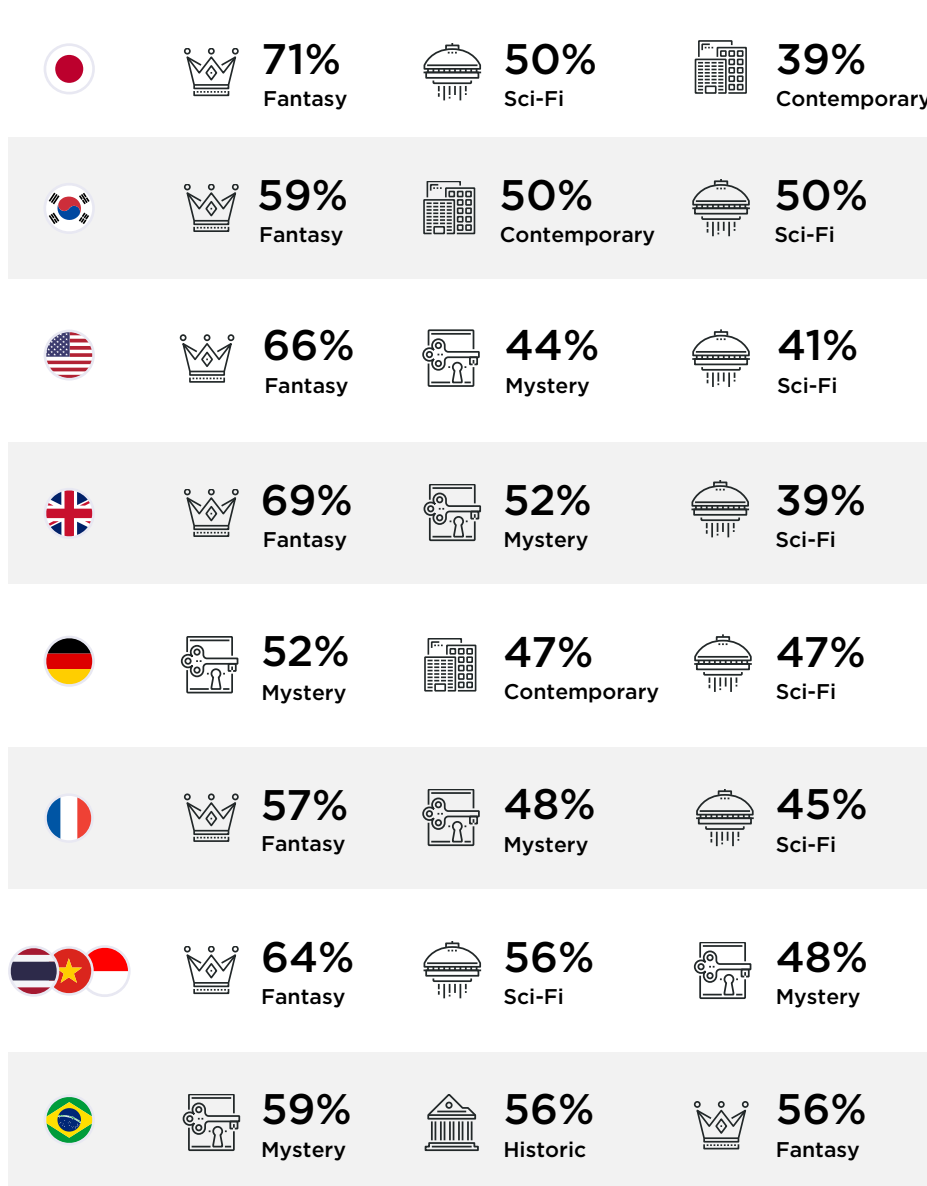
Puzzle

Casual/
Arcade

Role
Playing

Fantasy Takes an Almost Unanimous #1 for Favorite Mobile RPG Settings

Top Settings | Role Playing Games



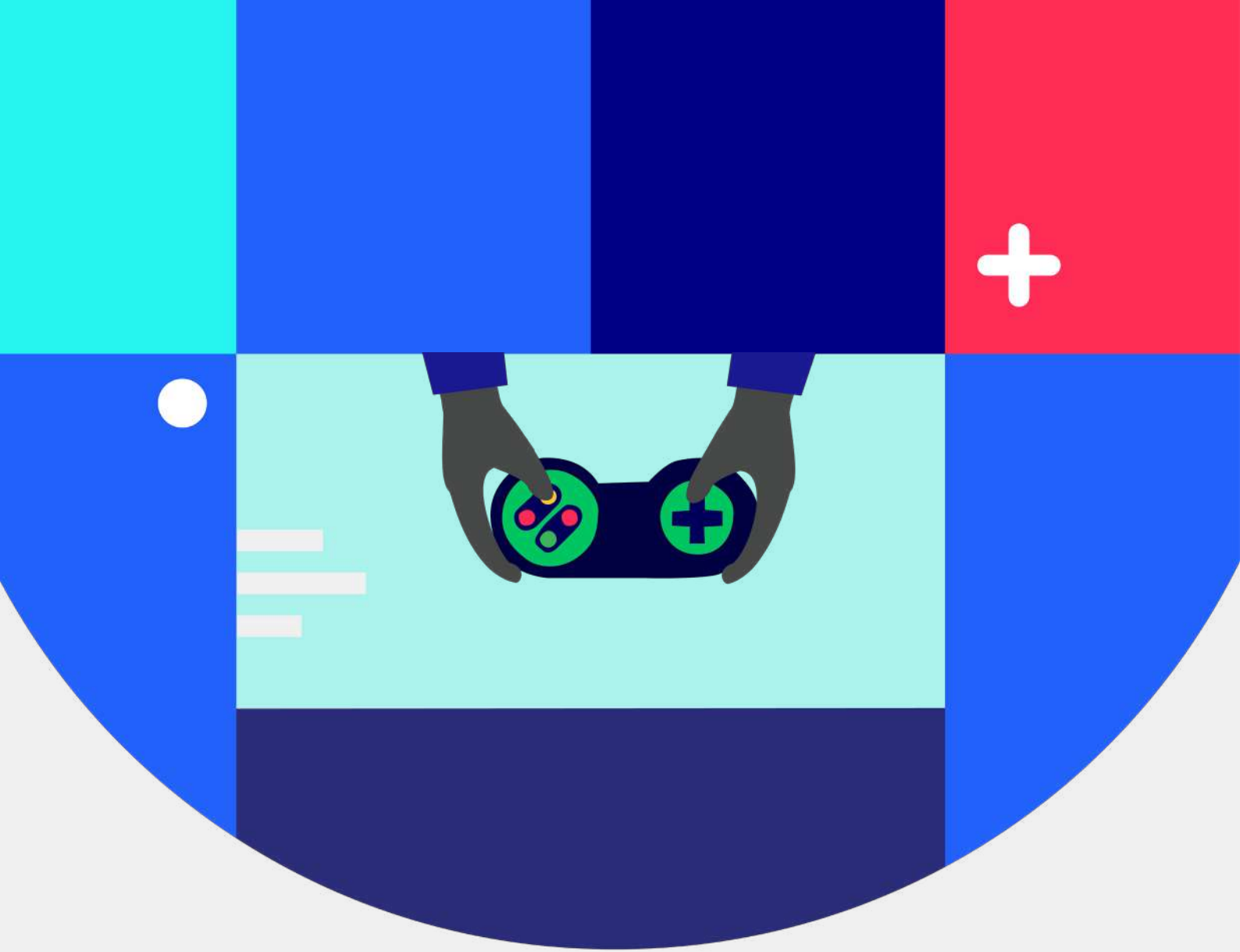
+

Fantasy is almost unanimously the #1 RPG style. RPGs found their origins in fantasy-based Dungeons and Dragons, and the theme has remained a staple of the genre.

+

Sci-fi is another notable RPG theme. Therefore, It is unsurprising to see it represented in the RPG ranking. **Asian markets** are likeliest to prefer the Sci-fi theme.

Base: TikTok users who play mobile role-playing games, selected for deep dive



TikTok
For Business

