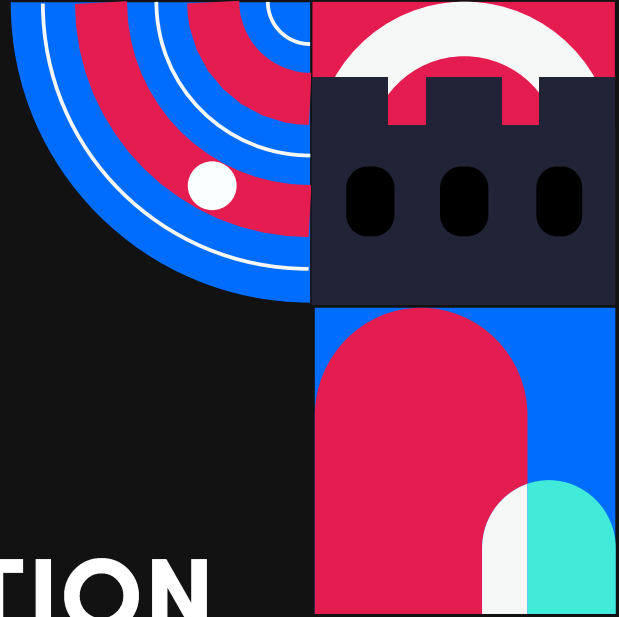




# Expanding Global Markets with Tailored Content

RPG Games Global Marketing White Paper





# INTRODUCTION

RPGs are mobile games centered around role-playing, which have garnered significant attention from users due to their standout elements like progressive growth stats systems, thrilling combat systems, captivating storylines, and innovative worldviews. Over the years, RPGs have grown into the largest segment of the global mobile gaming market, offering vast potential for further development. In terms of gameplay, RPG games have become increasingly more mature and diverse, including classic MMORPGs, ARPGs, turn-based RPGs, card-based RPGs, idle RPGs, match 3 RPGs, open-world RPGs, and other game types. This variety allows RPGs to cater to both traditional players and attract new users by incorporating innovative gameplay elements.

Although RPGs have shown evidence of positive long-term development, from a commercial perspective, RPGs are currently facing certain bottlenecks. These include a decline in market size, increased difficulty in product innovation, lower new user acquisition, and high churn rates. These factors have a significant impact on the operations of companies in the game industry. Therefore, it is essential to conduct in-depth research on this category in order to assist more gaming companies in discovering opportunities for a breakthrough in the market.

TikTok for Business, in collaboration with Gamma Data (CNG), conducted an extensive user survey across various global markets. The survey focused on 13 key regions including the United States, Japan, South Korea, Southeast Asia (Indonesia/Thailand/Vietnam), Europe (United Kingdom/Germany/France), Brazil, and the Middle East (Turkey/Saudi Arabia), among others. This survey collected feedback from a total of 10,519 users in the global gaming community to gain a comprehensive understanding of user demands across different regions. In addition, we conducted anonymous in-depth interviews with ten gaming companies to gather further industry insights and perspectives on RPGs. Based on the survey findings and industry trends, TikTok for Business collaborated with Gamma Data (CNG) to prepare the "RPG Games Global Marketing White Paper", aiming to address the challenges and difficulties faced by the development of RPGs to empower their long-term growth.

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Note: The user-related data in the report is derived from the survey. Therefore, all data presented in the document is based on the sample collected during the survey.

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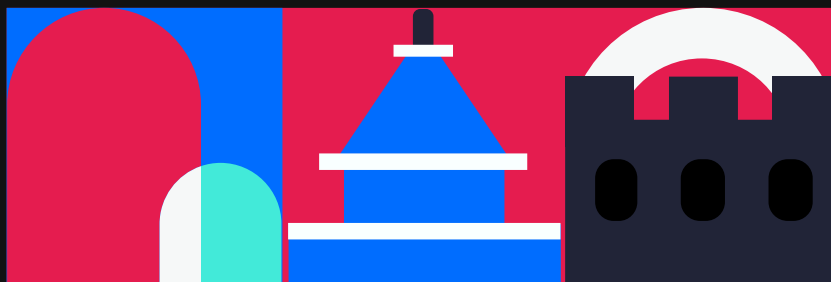
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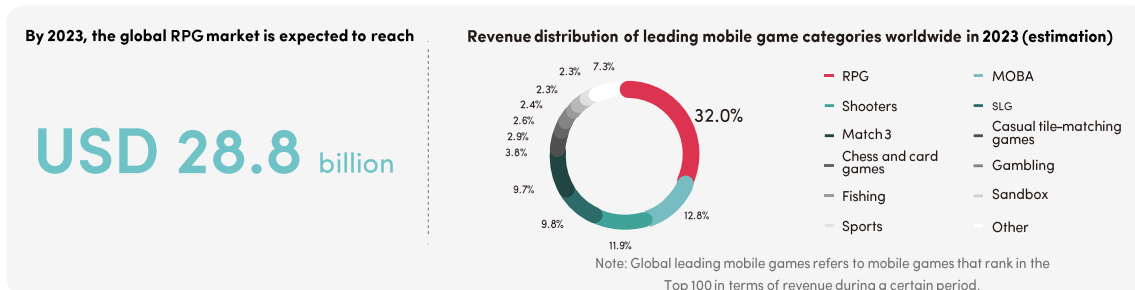
# 01

## Global Market Development of RPG Games

- The RPG genre stands as the largest category in the global mobile gaming industry, with the global market projected to reach USD 28.8 billion by 2023. However, the current revenue share of the RPG category worldwide is persistently decreasing, experiencing a total cumulative decline of 9 percent compared to 2019.
- The demands of game users have shifted, as classic MMORPGs have witnessed a consistent decrease in revenue due to player fatigue resulting from excessive time consumption and monetary expenditure. Consequently, there is an increased demand from users for alleviating the burden of gaming. Moreover, the landscape of user acquisition has also evolved. Acquiring RPG players poses challenges, including difficulties in buying traffic, addressing high churn rates, and regaining lost users.
- Five important key factors, including innovative gameplay, regional themes, localized art styles, global IP, and the ACG culture may help RPGs overcome development bottlenecks. Significant attention should be given to factors such as content-driven acquisition, localization, and long-term operations.
- The importance of non-gaming platforms for RPG players continues to rise, effectively amplifying the impact on user acquisition, retention, returning players, and payments. Short video platforms facilitate better growth of RPGs, as 89.3% of RPG players watch short video content on a daily basis.

# 1.1 RPGs remain large in scale; however, their market share has been steadily decreasing year by year, indicating a bottleneck in their development.

“ RPG games are the largest mobile game category in the world.



## Why do RPGs enjoy a high market share?

**Outstanding ability to encourage users to spend in-game**

The average monthly spending of RPG players exceeds the average by **6.73%**.

**Wide global audience**

In the global context, over **30%** of mobile players have played RPGs in the past six months.

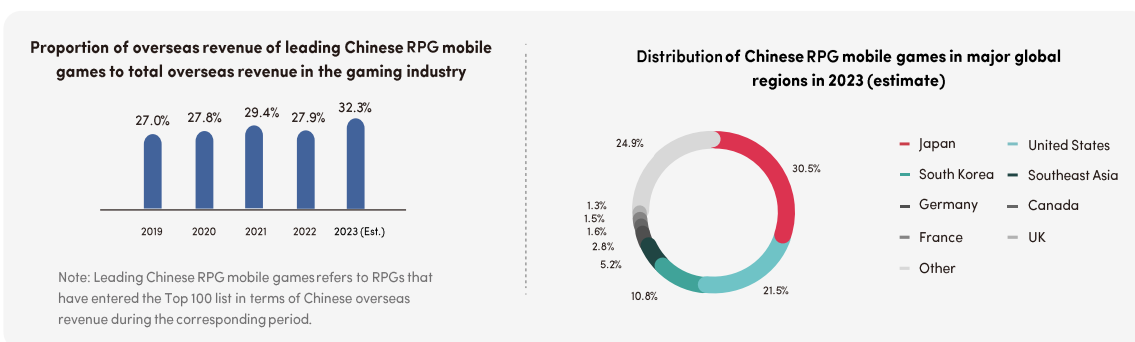
**Good at generating new content**

RPGs can integrate multiple gameplay styles and create derivative sub-categories, such as RPG + match 3, RPG + shooter, etc.

“ More and more outstanding RPG games are going global.

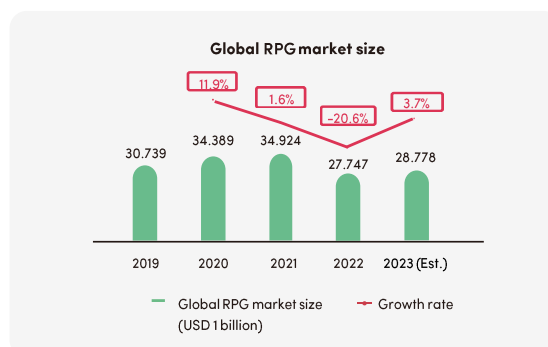
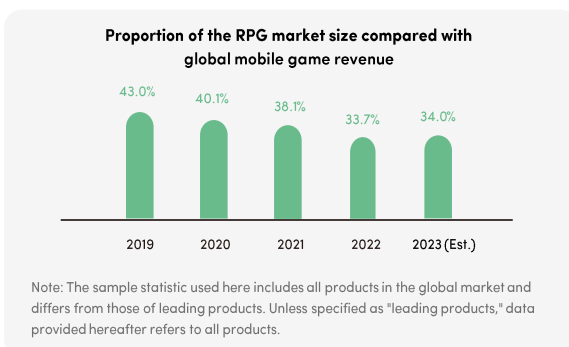
RPG games are an important category for expanding into global markets.

- It is expected that by 2023, Chinese RPG mobile games will account for over 30% of the total revenue from global markets, reaching a historical high.
- Apart from Japan, the United States, South Korea, and other important regions where RPGs are popular, typical RPG products are expected to emerge in regions such as Europe, Latin America, and the Middle East, where the market share of RPGs is not high on a global scale.



“ However, the development of RPG games is currently facing a bottleneck.

- The proportion of global revenue taken up by RPGs has been continuously declining, with a cumulative decrease of 9% compared with 2019.
- In terms of market size, although the RPG market is expected to rebound to some extent in 2023, the growth rate is still at a relatively low level.



# 1.1 The market size of RPGs remains large; however, their market share has been steadily decreasing year by year, indicating a development bottleneck.

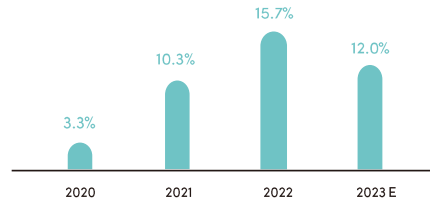
So, how did market bottlenecks happen?

## Users demands have evolved.

The rise of open-world RPGs has been driven by users' demand for innovative gameplay.

- RPGs offer a higher degree of freedom and autonomous exploration.**  
Most open-world RPGs offer open-world exploration and a high degree of interaction with the environment to provide players with greater freedom, while many other types of games tend to be more linear in gameplay. Since 2019, open-world RPGs have become very popular among players.
- Players prefer innovative gameplay:**  
Although open-world elements have been utilized in single-player games and console games for a long time, we have only seen their application in the mobile gaming industry in recent years. Due to the preference of RPG players for highly innovative games that offer a fresh experience, there has been an emergence of more innovative gameplay mechanics and increasingly specialized niche gameplay.

Revenue percentage of open-world RPGs for global leading mobile RPGs.

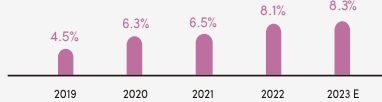


Note: Global leading mobile RPGs refer to mobile games that rank in the Top 100 in terms of revenue during a certain period.

The proportion of idle RPGs has seen a consecutive four-fold increase, reflecting users' demand for "reduced gaming pressure."

- Idle RPGs enable users to improve their combat power with minimal gameplay and login requirements, thus reducing the burden on players. Typical game elements of idle RPGs, such as offline rewards and automatic combat, allow players to organize their playtime more flexibly.
- Research results show that 26.5% of mobile players prefer games with lower time demands.

Quantitative percentage of idle RPGs in global leading mobile RPGs

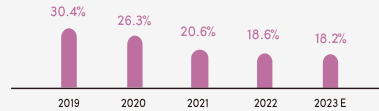


Note: Global leading mobile RPGs refer to mobile games that rank in the Top 100 in terms of revenue during a certain period.

The rapid decline in revenue for classic MMORPGs is caused by user fatigue towards games that require excessive time consumption and monetary expenditure.

- Classic MMORPGs focus on competing for combat power, with additional payments and participation in events being the core sources for increasing combat power, thereby placing high demands on users' spending capacity and online duration.
- The survey findings indicate that 26.1% of mobile players have stopped playing games due to payment-related reasons.

Classic MMORPGs as a percentage of global leading mobile RPGs



Note: Global leading mobile RPGs refer to mobile games that rank in the Top 100 in terms of revenue during a certain period.

## User acquisition has changed.

The cost of acquiring users through performance advertising has increased, making it more difficult to acquire new users.

- Continuously acquiring users through performance advertising has become challenging:**  
The acquisition of RPG players largely depends on performance advertising. When ROI decreases and the cost of user acquisition increases, companies often face a dilemma of having to choose between acquiring users at a higher cost or shortening the campaign cycle.
- Marketing channel ossification:**  
The scarcity of new marketing channels has made it difficult for companies to acquire new users. With competition primarily concentrated on existing users, it has become harder to explore and reach new users.



RPG Publisher A

"The spending power of RPG players is indeed relatively high, but most RPG products have a user acquisition window of less than six months. This is mainly due to intense user churn, which increases the difficulty of tapping into potential users later on."



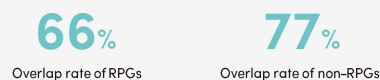
RPG Publisher B

"In the global gaming industry, acquiring users has become a common challenge, mainly due to the ossification of marketing channels and the lack of new avenues for growth. Everyone is competing for the existing user base."

RPG players have a higher propensity to experience churn, making it challenging to re-engage with them.

- More willing to give up on the game:**  
Competing for combat power remains a significant draw for gamers. Still, when the enjoyment of the game fades, or factors such as short-term non-logins or unsuccessful gacha pulls result in decreased combat power, users become more susceptible to the impacts of excessive time consumption and monetary expenditure. This may lead them to abandon the game, resulting in a low overlap rate for RPGs.
- Challenging to re-engage with users:**  
Due to factors such as falling behind in combat power, difficulty in increasing in-game statistics, the large number of game options available, and intense competition in gameplay, RPG players are less likely to return compared to their counterparts in other categories, which in turn affects the product lifecycle.

Overlap rate of Top 100 mobile games in terms of annual global revenue in 2023 (estimation)



Note: The overlap rate refers to the proportion of products that appeared on the previous year's list and continued to appear on the following year's list. Taking RPGs as an example, the overlap rate is 66%, meaning that 66% of the Top 100 RPGs in 2023 were also in the Top 100 in 2022.  
Note: The higher the overlap rate, the longer the game lifecycle.

Data source: Gamma Data (CNG)

## 1.2 What opportunities are there for overcoming development bottlenecks?

Based on the market conditions mentioned above, there are five key industry factors that could help overcome bottlenecks for RPGs:

Innovative gameplay, regional themes, localized art styles, global IP, and ACG culture.

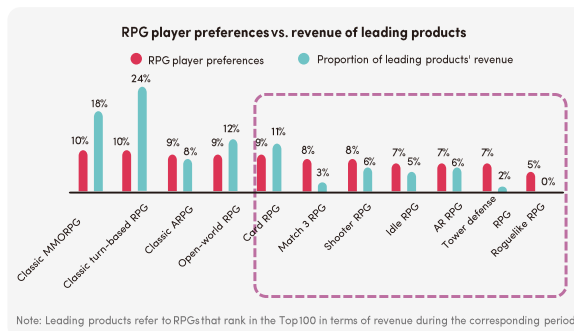
**Gameplay:** The gameplay segmentation is yet to be determined, and exploring more emerging sub-genre gameplays has become key.

**Focusing on blending gameplays:**

Currently, there are still many emerging "RPG +" subcategories that cater to user needs and have yet to be developed.

**Opportunities for categories:**

Among the emerging categories in top games, **match 3 RPGs, shooter RPGs, tower defense RPGs, and Roguelike RPGs** have shown low revenue figures, indicating a relatively low level of satisfaction in meeting user needs.



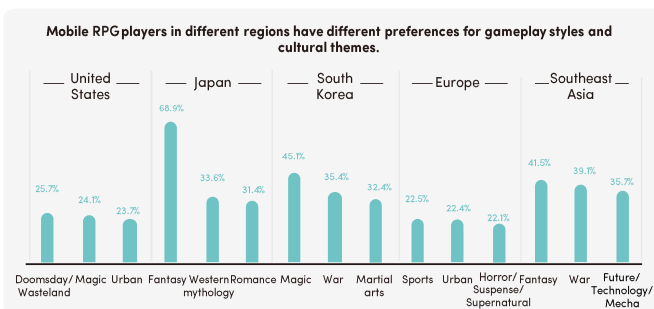
**Theme:** Cultural themes are key in shaping the characteristics of RPG products, and innovative regional themes offer opportunities for breakthroughs.

**There is significant regional diversity in themes:**

RPGs emphasize the unique features of the product in terms of story, characters, etc., and cultural themes are the core elements that shape the characteristics of the game. **However, wide variations exist in users' thematic preferences globally. Thus, it is crucial to grasp the unique characteristics of regional user preferences.**

**Innovations in regional themes:**

In addition to conventional themes highly favored by users, breakthroughs in innovative thematic preferences have become crucial for RPGs. For example, themes such as horse racing in Japan indicate a certain level of content-driven innovation.



Typical example: ウマ娘 プリティーダービー



Theme: Horse racing

**Opportunity:** With a well-established horse racing culture in Japan and over 90% of its revenue coming from the Japanese market, "ウマ娘 プリティーダービー" made it into the Top 10 of global RPGs in terms of revenue in 2023.

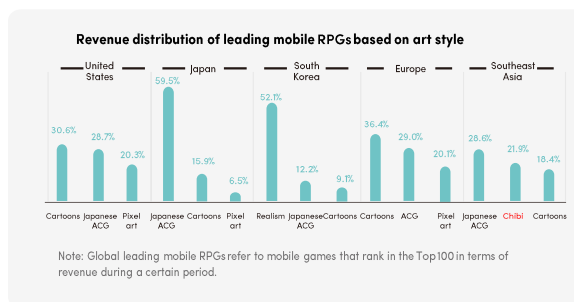
**Art style:** Around 50% of gaming companies prioritize localizing their art style, catering to visual preferences and creating distinct selling points for their products.

**A localized art style is particularly important:**

51.5% of gaming companies going abroad prioritize art style localization. Different regions have significant variations in how revenue is generated by various art styles, and art styles based on regional user preferences are more likely to attract the attention of users.

**Opportunities exist for niche art styles:**

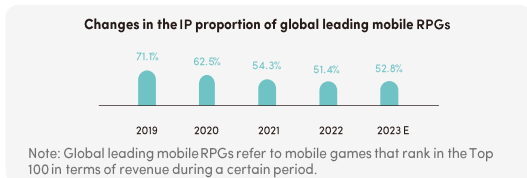
Currently, competition over art styles primarily revolves around focusing on enhancing the game's visual presentation to gain a competitive edge, and searching for niche art styles. For example, gothic and hand-drawn art styles are also relatively cost-effective. However, companies need to perform multiple tests to find ways to differentiate themselves through game art.



**IP:** Boosting product performance creates ample room for leverage.

**IP can enhance revenue performance:**

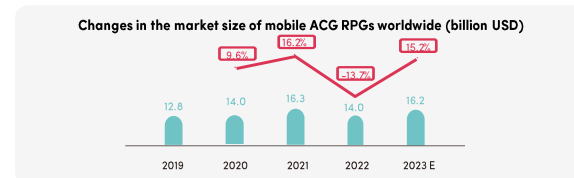
Derived games based on IP consistently occupy more than half of the overall market share, and there is significant potential for the development of global IPs.



**ACG:** Consistently a prominent feature in RPG products, which continues to hold significant potential for development even today.

**The ACG culture is very popular:**

ACG culture has been a key and innovative element in the rapid development of RPGs, and it is expected to have long-term potential for development in the future.





## 1.2 What opportunities are there for overcoming development bottlenecks?

“ In addition to the aforementioned five key industry factors, what other opportunities should be given more attention?

### Strengthening the development potential of game content and exploring opportunities through communities outside of gaming.

**Advantages of organic content:**

Users are more easily attracted to download games with organic content, and more opportunities can be explored by leveraging organic content.



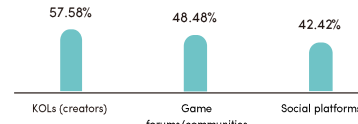
RPG Publisher A

"Undoubtedly, companies would most want to see users being captivated by the organic content of the game before downloading it. This indicates that users are genuinely impressed with the game itself, which will benefit subsequent user conversion and retention."

**Trends regarding creators:**

Creator marketing and content marketing are gaining increased attention from companies as they offer multiple approaches to acquiring new users and retaining existing ones.

What channels has your company primarily utilized for marketing activities in global markets?



Note: The above data is sourced from specialized research conducted by Gamma Data (CNG) for gaming companies going abroad.

Tips: It is necessary to find more efficient user acquisition strategies, strengthen the development potential on the content side, and leverage content to discover more growth opportunities.

### Localization is challenging, so it is crucial for companies to understand the preferences of local users.

**User perspective:**

Users have a high demand for localization and are earnestly searching for games with a worldview, art style, and culture tailored to market preferences.

**78.9%** of users care about game localization.

- Familiar language (33.2%)
- Familiar in-game actions (32.3%)
- Worldviews inspired by familiar cultures/history (31.6%)
- Familiar art style (30.8%)

**Company perspective:**

Gaming companies going abroad indicate that the current challenges with expanding into international markets lie in the lack of insight into the preferences of global users and predictions on future trends. Therefore, a deep understanding of different global markets is particularly important.

**Expansion of game companies in global markets:**

- 60.6%** of companies believe regional markets offer more opportunities.
- 51.5%** of companies believe that the difficulty in expanding into global markets lies in the lack of accurate understanding of user preferences.
- 48.5%** of companies believe that the difficulty in expanding into global markets lies in the lack of accurate judgment of future trends in the market.
- 48.5%** of companies believe that focusing on the demands of segmented user groups will bring more opportunities.

Note: The above data is sourced from specialized research conducted by Gamma Data (CNG) for gaming companies going abroad.

Tips: It is necessary to gain insights into the characteristics of users in different markets around the world to develop games and acquire users in a way that is more in line with the gaming habits of local users. Additionally, it is important to find suitable platforms to explore the values of potential users.

### Focusing on long-term game operations and emphasizing the improvement of long-term LTV (lifetime value).

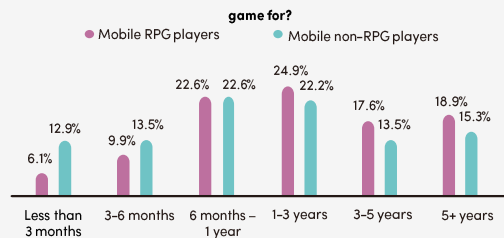
**More loyalty to the game:**

RPG players have more loyalty to the game than the average mobile game player and play games for a longer duration. Therefore, continuous management of long-term users is required to enhance user conversion rates and tap into the long-term value of users.

**Long-term users spend more on the game:**

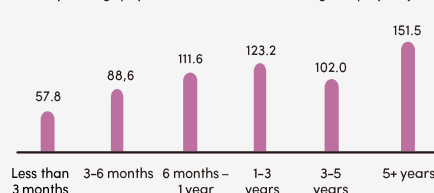
The length of user retention is positively correlates with their spending power. Long-term users tend to spend more on the game, thus acquiring more long-term users can generate higher revenue and alleviate the pressure to be profitable. Appropriate measures should be taken to maintain the engagement of long-term users and encourage them to pay more.

Among the mobile game you're playing, what is the longest duration you've played a game for?



The more time an RPG player plays a game, the more money they spend

Monthly average payment amount of RPG mobile game players (USD)

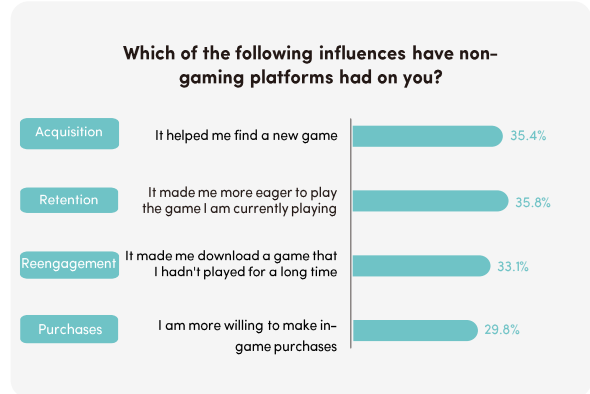
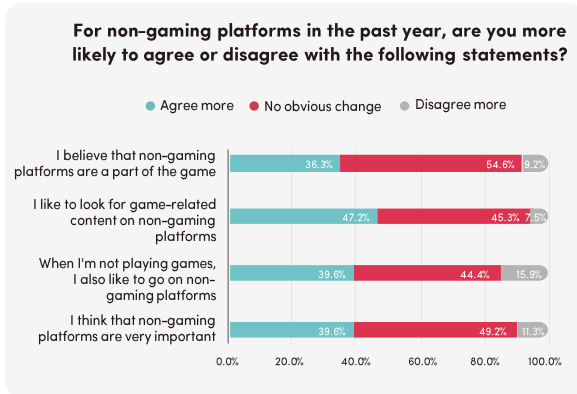


Tips: It is necessary to find methods to attract long-term users and cultivate their loyalty to tap into the value of long-term operations.

# 1.3 To leverage non-gaming platforms and explore opportunities for reaching more users, it is necessary to focus on the growth potential of short video platforms.

## The importance of non-gaming platforms for RPG players continues to grow.

- The significance of non-gaming platforms is becoming increasingly prominent. 36.3% of RPG players are more likely to agree with the statement "I think that non-gaming platforms are a part of the game", indicating that non-gaming platforms can provide more added value.
- Non-gaming platforms effectively enhance results at all stages, such as user acquisition, retention, returning players, and payments. They allow more players to discover the game, be retained, and return to the game, and increase their willingness to make in-game purchases.



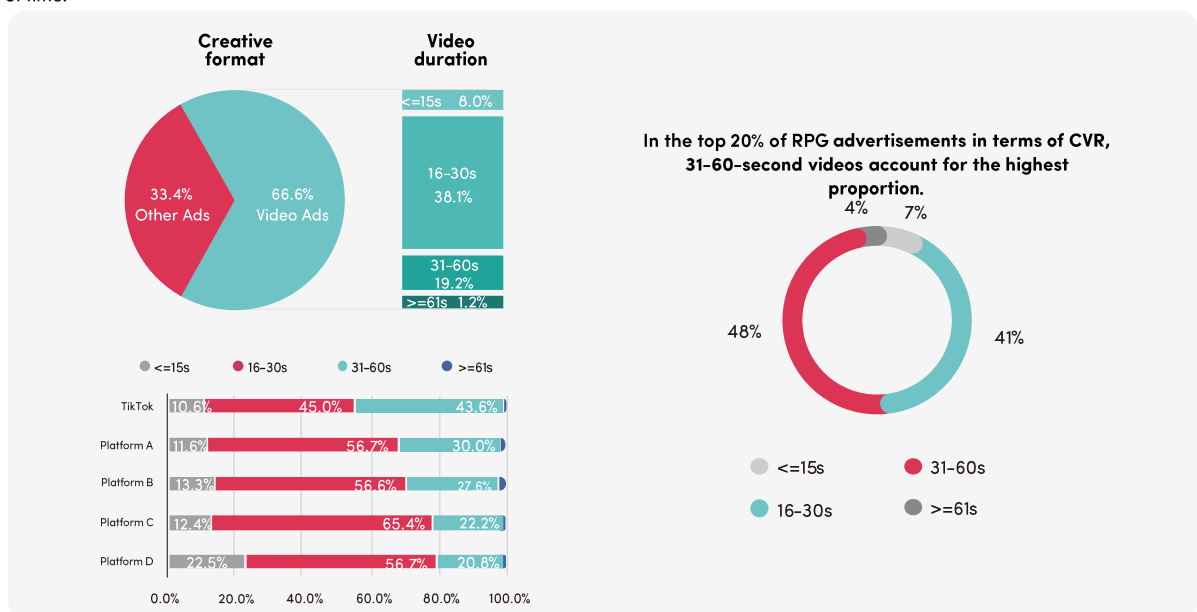
## Short video platforms help RPGs increase their marketing growth.

- Short video platforms have greater user preferences. As a non-gaming platform, a short video platform has common advantages in terms of RPG player size and player stickiness, and is a suitable tool for enterprises to reach more players.
- Short videos are the most commonly used form of advertising for RPGs at this stage. From the advertising creatives of leading RPG mobile games in the industry, it can be seen that video materials account for more than 60% of all creatives, among which 16-60-second short videos account for the highest proportion and represent the mainstream format at present. Video content can provide a more realistic, entertaining expression of game elements, and more directly show the highlights of RPGs within a short period of time.

**89.3%** of RPG players watch short videos every day.

**34.2%** of RPG players are spending more time watching short videos.

- TikTok short video advertisements perform well. The platform's 31-60-second short videos account for the largest proportion of short videos on TikTok and yield favorable results. According to TikTok Creative Center, among the top 20% of RPG advertisements in terms of CVR, 31-60-second videos account for the highest proportion.



- In conclusion, there is a synergy between short video platforms and the marketing of RPG games, which represents significant untapped potential to be explored in the future.

Data source: Gamma Data (CNG), AppGrowing

# 02

## Insights into Users and Content Trends of RPG Games

- More than 60% of RPG players express a preference for ACG culture. ACG fans pay greater attention to content and exhibit stronger interactions, and the game community proves to be effective in sparking the gathering of ACG fans and fostering their interactions.
- RPG users have a significant preference for IP, with 81.9% of whale players having played leading IP-based RPGs. Short video platforms showcasing diverse IP culture and rich IP content can tap into target users and drive more beneficial marketing outcomes for the product.
- Story and character development rank as the top 2 preferences of RPG players, and short video content can effectively expand on the story, character development and other attributes of RPG games.
- Genre blending facilitates the continuous development of new user groups. RPG games can be combined with shooters, casual tile-matching games, puzzles, and other elements to create casual gameplay experiences. This approach helps form user acquisition advantages and attracts a wider audience.
- Over 60% of publishers are facing increasing user acquisition costs. Leveraging content ecologies can help publishers reach more people and achieve user growth. Additionally, by curating a range of content such as UGC, PGC, and BGC, publishers can enable users to discover and fall in love with games.

## 2.1 Insight 1: The ACG culture has a wide global audience. Community engagement and positive word-of-mouth about content are vital for attracting users.

**A wealth of ACG RPG players:** From the perspective of overall development across various regions, ACG-style games offer substantial opportunities for growth. These development advantages are mainly concentrated in the genre's vast fan base. **More than 60% of mobile RPG players like ACG culture, and 70% of RPG mobile game users have played ACG-style games.**

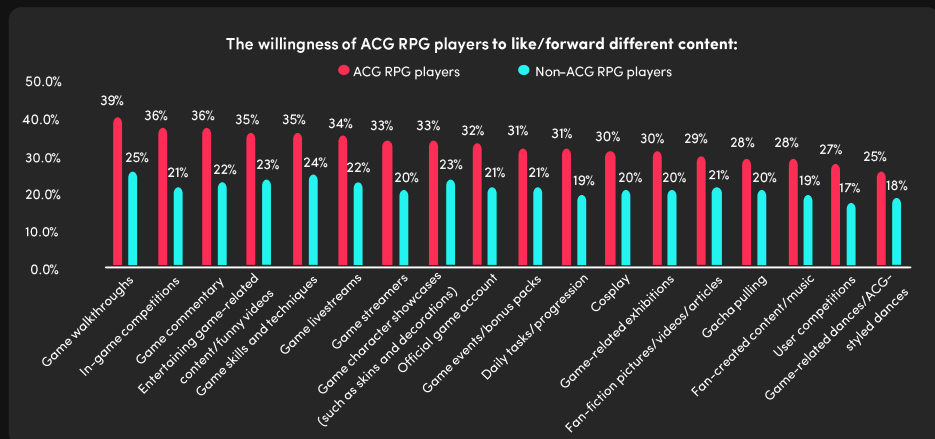
### Communities have a huge impact on ACG fans:

**More fans obtain information about games through game forums/communities,** and marketing on platforms with a higher concentration of ACG fans will yield better outcomes. Content related to high-quality games has the potential to generate more traffic in communities outside of the game's existing fan base.

ACG-style RPG players will be more likely to be impacted by non-gaming platforms when deciding to download new games, continue to be retained, return to the game, and increase their spending. **For ACGs, the non-gaming community plays an important role by providing users with a platform to gather, discuss, and communicate.**



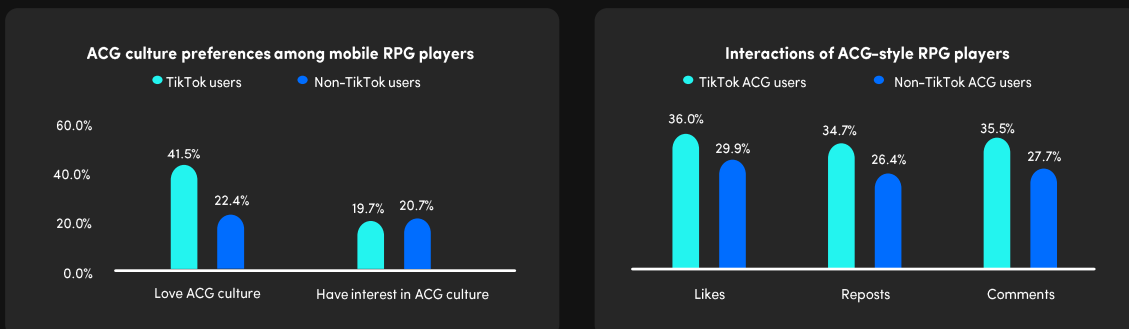
**Emphasis on content and strong interactions:** ACG RPG players pay more attention to a game's content and are willing to like/forward different types of game content, especially content related to walkthroughs. ACG RPG players prefer to watch, discuss, and share various types of game content in forums and communities.



## TikTok communities inspire ACG fans to gather and interact together.

**TikTok has a wealth of ACG players:** Sixty percent of RPG users on the TikTok platform have a preference for ACG culture, and the proportion of users who are very fond of ACG culture is much higher than that of non-TikTok players.

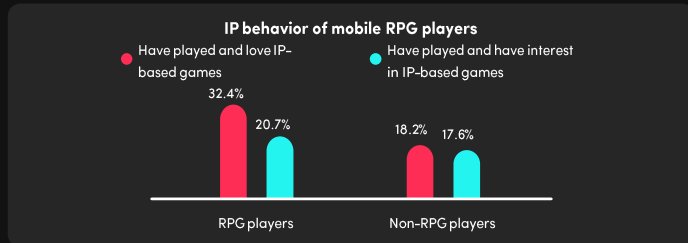
**Strong interactions among TikTok ACG players:** ACG players on the TikTok platform have a stronger likelihood to like, forward, or comment on content, and ACG players are more active, making it easier to carry out in-depth interactions.



## 2.2 Insight 2: IP will continue to be a major focus for acquiring users in the long term, and creating compelling content around an IP can be a key strategy for success.

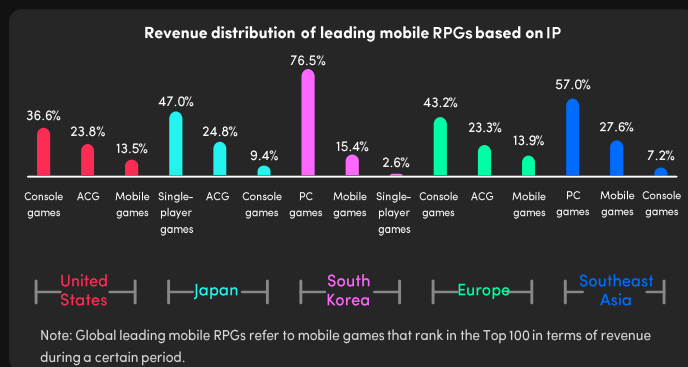
**RPG players have a high preference for IP:** Mobile RPG players display a significant preference for IP. In addition to infusing rich content elements into games, leveraging IP in marketing can effectively capture users' attention and attract a substantial user base. This approach enhances the impact of global IP advantages.

**More whales:** RPG players reached through IP have a strong spending capacity and can attract more whales. Among them, **81.9% of whales\* have played mobile RPGs based on IP.**



**Different regions have distinct IP strengths:**

Globally, different regions can identify IP types that align with local preferences to enhance their RPGs. For instance, console games and ACGs thrive in the United States, single-player games and ACGs are popular in Japan, and South Korea experiences the highest revenue in PC games. Leveraging mature IP cultures and elements in different regions can assist games in finding better entry points.



**It's easier to acquire IP users on non-gaming**

**platforms:** Users who resonate with IP in RPGs tend to be more active on non-gaming platforms. These users spend a lot of time watching game-related content, and get information about games through interactive challenges, livestreams, and creators.



IP products represent cultural symbols, and more core users can be tapped from a field of diversified IP cultures and rich IP content.

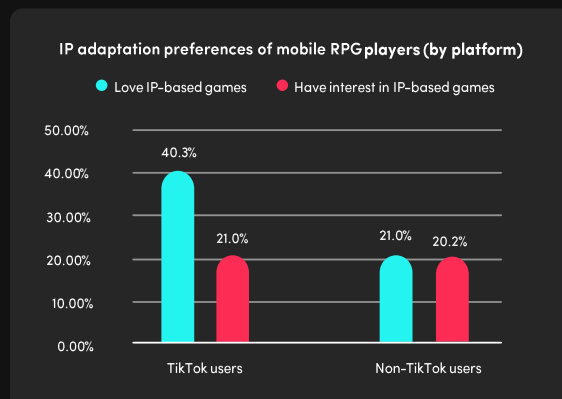
RPG Publisher A

"IP itself has a wealth of elements to draw from and can be utilized on content platforms for challenge competitions or offer creator incentives to attract players or members of the IP fanbase to participate."

RPG Publisher B

"IP games will use some of the original cultural content of the IP to launch. If the platform has an impressive volume of IP content and a large fanbase, it will facilitate IP-based games in quickly reaching potential players."

### TikTok contributes to the acquisition of IP users and the portrayal of IP characters.



**TikTok is more suitable for IP content promotion:**

TikTok users have a significant preference for IP-based mobile games. Data shows that TikTok users have a stronger preference for IP-based mobile games when compared with non-TikTok users, which gives TikTok the advantage in conversion rates. Moreover, on the TikTok platform, content from various IP series generates high levels of interest, capturing the attention of users who are interested in such content.

**Organic content on TikTok helps to portray IP characters:**

43.7% of IP users will get game information on TikTok because of its diverse offerings (a variety of interesting content such as funny and cosplay-related content). TikTok can effectively help to portray IP characters. By launching works with IP-derived content (such as fan-created ACGs, related content, etc.), having creators explore the depths of the characters, and increasing the popularity of content through elements such as music, song and dance, all of these efforts can help extend the popularity of IP products.

Data source: Gamma Data (CNG)

\*Note: In the report, whales, dolphins, and minnows are different types of game users who have the ability to consume and make purchases. The game consumption values of whales, dolphins, and minnows differ from market to market, but their delineation adopts the same standard, that is, the proportion of average consumption among local game users compared with the average income. Users whose game consumption occupies a higher proportion of local income are whales, while users with a lower proportion are minnows and dolphins are somewhere in between the two.

## 2.2 Insight 2: IP will continue to be a major focus for acquiring users in the long term, and creating compelling content around an IP can be a key strategy for success.

### “ IP topics that are highly popular on TikTok

#naruto Views: 328 billion	#marvel Views: 287 billion	#disney Views: 264 billion
#onepiece Views: 257 billion	#spiderman Views: 198 billion	#harrypotter Views: 163 billion
#strangerthings Views: 137 billion	#demonlayer Views: 120 billion	#dragonball Views: 90 billion
#starwars Views: 88 billion	#jujutsukaisen Views: 85 billion	#attackontitan Views: 75 billion

### “ Creative content of IP games on TikTok

#### 1. IP & Character benefits

Show the modeling, clothing, voice, personality, and other characteristics of the original classic IP characters in games, and pique the audience's desire to obtain these items based on the popularity and rarity of the characters.

##### Introducing new characters in the game through collaboration with the ACG IP



**Creative content:** The game is a collaboration with the well-known cartoon IP "Spongebob Squarepants" and the original character appears in the game as a new accessible character, evoking a desire among players to collect new characters. In addition, resource rewards can be used to further promote user behavior.

#### 2. IP & ACG clip montage

Cross cut game images with clips from the original ACG to clearly show the relevance between the game and the original IP, ensuring that the audience can quickly identify this connection and evoke emotional resonance through the recreation of the original work.

##### Special effects in games allow for realistic recreations of the original's designs



**Creative content:** Show the attack action and skill special effects of the original IP characters in the games, insert the corresponding footage of the original show at key moments when using ultimate skills, and then quickly cut back to the game screen. Through a comparison of these two perspectives, the content highlights the high degree of recreation of the original work in the game and piques the audience's interest.

#### 3. IP & Fan-created content

Creating new content based on the original story background, character design, and other expanded elements, these kinds of videos are often more refreshing and appealing.

##### Creators reenact Star Wars

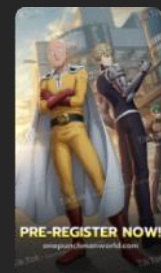


**Creative content:** Evoke an instant recognition of Star Wars through iconic elements such as light sabers, Jedi robes, and stormtroopers. The creator presupposes a battlefield scene and describes the characteristics of the game through an intense and gripping story, creating a contrasting perception.

#### 4. IP & Battle scene recreations

Recreating classic scenes from the IP, especially emotional battle scenes, instantly taps into the audience's memories and creates an intuitive connection with the game.

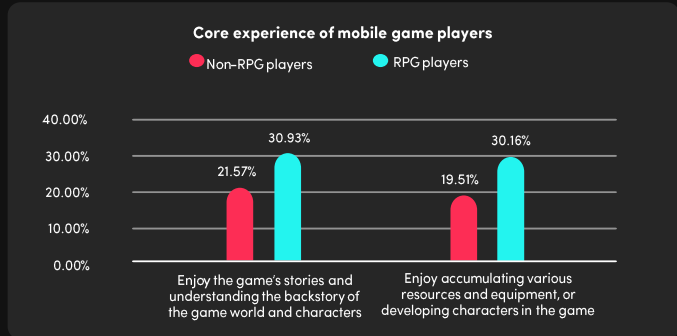
##### Reenactments of popular characters in battle scenes



**Creative content:** Show the battle scenes of several well-known characters from the original IP in turn and establish instant IP recognition with an art design that is highly consistent with the style of the original work. Exciting background music combined with intense battle scenes can make the audience eager to try the game out.

## 2.3 Insight 3: Character-related stories and character development are essential elements of RPGs, and short videos can magnify the attributes of characters and storylines.

**Strong preference for story and character development:** Among all game experiences, story-related content and character development rank in the top 2 among preferences of RPG players, and this preference differs significantly from that of non-RPG players. Therefore, marketing initiatives that focus on character stories and development are the key to RPG products, and it is necessary to find appropriate scenarios to expand on elements of the game's characters and story-related content.



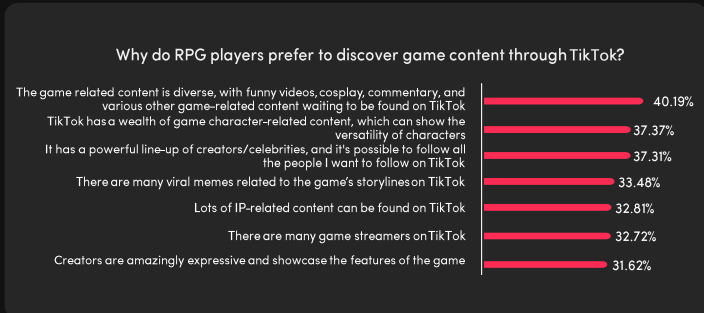
"Compared to other categories, RPGs are characterized by a strong narrative and the ability to craft valuable characterization. Consequently, RPG content marketing should either delve into expanding the story, intensifying character development, or strategically leveraging the game's characters in popular viral memes on social media platforms."



"Presenting the gameplay of RPGs through video content and interactive scenarios allows advertisement content to take on a form that closely aligns with RPG and role-playing experiences."

### TikTok enhances the RPG's characters and storylines:

With the help of creators, skin-themed costumes, audio and video editing, and cosplay-related content can be created that fittingly portrays game characters. By connecting game characters with viral memes, IP, storylines and other elements through creators, content narration is used to expand on the character development, character stories, and other game elements, deepening characterization, and making characters more charismatic.



### Fan-created character content



"Due to the rich pool of creators on big platforms, TikTok can consistently find creators who share similar attributes with the game's characters to collaborate on content creation, which results in content that better showcases characters and compelling storylines to attract users."

### Character cosplay



### Character-related viral memes



"Viral memes generally spread more easily and capture greater attention on platforms. RPGs can play with memes derived from their storylines or worldviews, combined with current hot social topics on TikTok or entertainment-related content which is popular among players to increase the popularity of games."

Data source: Gamma Data (CNG)

## 2.4 Insight 4: Incorporating innovative gameplay is crucial for attracting new users, and RPGs featuring casual gameplay are becoming an important direction to explore.

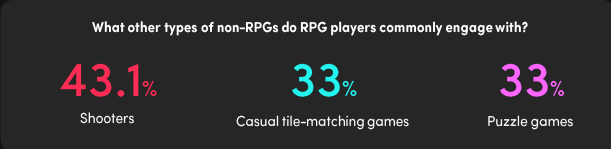
**Focusing on integrating innovative gameplay:** Some products may encounter a bottleneck in terms of an ossified experience. Through genre blending and sub-genre gameplays, it is possible to keep developing new user groups and supplementing with multiple groups of users belonging to other categories.

**Casual gameplay emerges as a crucial focus:** RPG users also demonstrate an interest in games featuring elements of shooters, casual tile-matching games, puzzles, and other elements. The integration of casual gameplay in RPGs can create a more diverse type of gameplay, which lowers the threshold of difficulty for players, stimulates players' willingness to try new things, and attracts more users. It is anticipated that this trend will become a long-term developmental focus for RPG games.



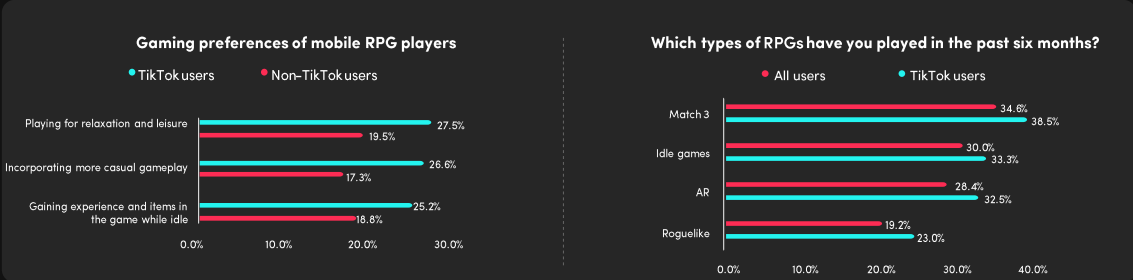
RPG Publisher A

At this stage, we can see that companies keep trying to incorporate non-core gameplay. User acquisition with sub-genre gameplay undoubtedly broadens the target group of products. However, at the same time, it is necessary to pay attention to the product itself and the need to have a broader variety of content to retain users.



### TikTok facilitates casual RPG gameplay to acquire more players.

Marketing on platforms with a higher number of users who prefer casual RPG gameplay can improve the efficiency of user acquisition. TikTok users prefer a fusion of gameplays that offer a casual vibe and are provide a relaxed gaming experience. TikTok users have a stronger preference for match 3, idle, and AR-based RPG games.



### Casual gameplay creatives on TikTok help expand the user base.

- Casual game content can help develop pan-user groups that are adjacent to the existing user group, drive additional user growth, and maintain a longer game life cycle.
- Casual game content is direct, interesting and easy to understand and thus more entertaining, which fits better with the vibe of TikTok. Moreover, it is easier to be universally welcomed by pan-user groups and generate increased interactions, establishing a more intimate relationship between the game and its users.
- Casual game content can attract users at a lower cost, thus capturing more organic traffic and activating more RPG users in other categories.
- By combining the gameplay's content with TikTok creators, their unique creativity and video creation skills can further magnify entertainment content.

Casual gameplay	Combat power battle	Draw to merge	Bullet hell	Hack and slash
Casual elements	Fast calculation + leaderboards	Path planning + combining + fast calculation	Obstacle avoidance + fast calculation	Directional control + timing
Case study				
Creative analysis	Simple number comparisons are incorporated into the gameplay, highlighting strategy and low entry barriers through the selection of opponents and continuous increases in the protagonist's stats.	Multiple targets are incorporated into connecting the line and the sum of their number is greater than that of their opponents, which further intensifies the tests faced by the player in terms of path planning and stats battles.	Players need to control the character to evade and defeat approaching enemies, thereby obtaining rewards. There are certain requirements for hand-eye coordination, quick reaction times and damage calculation, which is designed to heighten the tension.	Players control a character which moves around freely, aiming to cover as large an area as possible while avoiding monsters as they randomly appear, enhancing the emotional experience through sudden encounters.

Data source: Gamma Data (CNG), AppGrowing, TikTok Creative Center



## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

As marketing costs continue to rise, publishers need to leverage the content ecology to acquire more users.

**Traditional advertising is facing bottlenecks:** Traditional creatives struggle to satisfy user preferences due to the high consumption of creatives and the creative production challenges. As a result, publishers face increased pressure in terms of user acquisition.

**Searching for new marketing methods:** The cost of traditional advertising continues to rise without a corresponding increase in effectiveness. Publishers need the support of new forms of marketing to obtain more organic traffic and reduce marketing costs.

**Maintaining users with content:** Games need more content to maintain user loyalty and meet their needs for socializing and consuming gaming-related content outside of the game. By providing compelling content, users can be inspired to engage more and interact with the product.

**Realizing the effective supply of content:** Although gaming publishers possess a large volume of high-quality game content, they fail to leverage appropriate marketing tactics to acquire more target users and fully exploit the advantages of the content that the game has to offer.

The primary concern lies in the increasing unit price for acquisition among outbound companies?



Note: The above data is sourced from specialized research conducted by Gamma Data (CNG) for outbound gaming companies.

RPG Publisher A

Publishers that have a well-established content ecology will have lower user acquisition costs. One aspect is understanding how to efficiently acquire users through content, while the other aspect is leveraging more organic traffic."

RPG Publisher B

"I believe the key to content ecology is not to solve problems related to user acquisition and downloads, nor is it a part of advertising strategies. Instead, it is more about generating a boost to help create more popular and outstanding products on top of your existing strategies and emphasizing the combination of content marketing and performance advertising to achieve a '1 + 1 > 2' effect."

### The thriving game content ecology on TikTok is a fertile ground created jointly with players.

**62%**  
of TikTok gamers discover new games on TikTok.

**73%**  
of game enthusiasts feel like they're part of a community on TikTok.

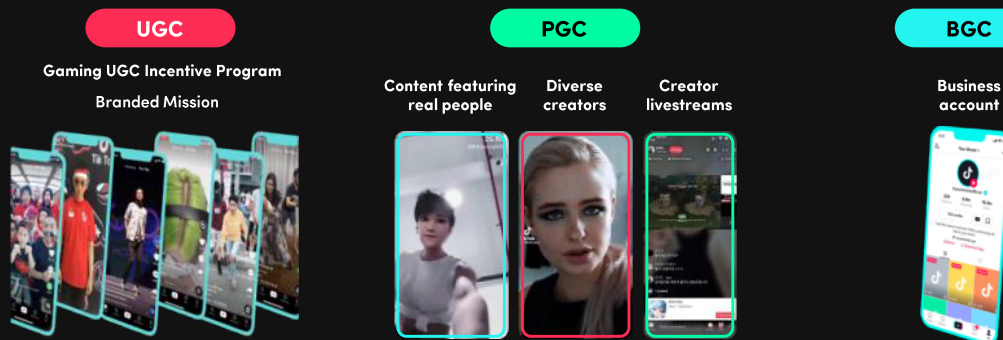
**1.2x**  
After watching gaming content on TikTok, users' willingness to download games increases.

**Highly popular content**  
Total views of game content on TikTok: **3 trillion+**

**Wide coverage of content**  
Categories of game-related content created by creators: **200+**

**Vivid and interesting content**  
of users perceive TikTok's content as fun and interesting: **65%**

“ Create great content on TikTok and utilize diverse content throughout the entire user journey.



Make users discover, become familiar with, and develop a strong affinity for the game.

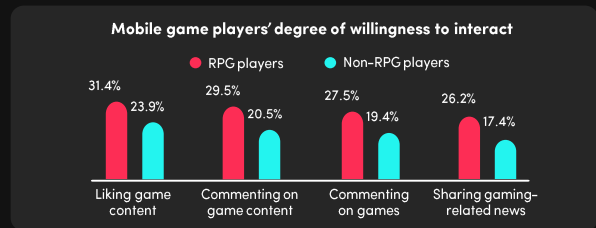
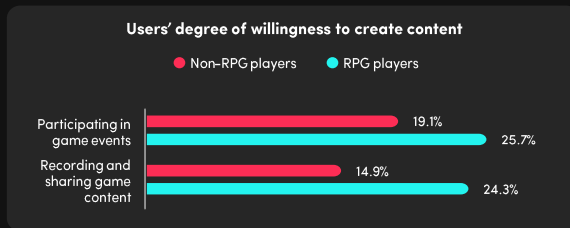
Data sources: Gamma Data (CNG), TikTok Data  
Note: UGC refers to user-generated content that is produced and published by individual users. PGC refers to organic content produced and published by creators or individuals with professional knowledge, providing more professional insights. BGC refers to content produced and published by brands.

## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

**Co-creation and interaction:** RPG players have a high willingness to create and interact, and highly interactive content activates players' imaginations.

**Strong willingness to create:** RPG players have a greater willingness to record and share game content and participate in game-related events, thereby providing more opportunities to become native content producers.

**High willingness to interact:** RPG players are more willing to engage in activities such as sharing, liking, commenting, etc., which helps spread content and expand the reach.

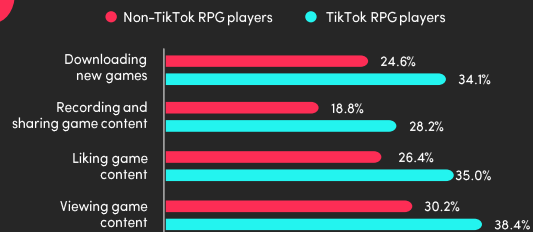


### The high degree of user interaction on TikTok offers potential for the creation of more content.

TikTok users have qualities such as a high degree of immersion and activity. They are more likely to discover, watch, and share game-related videos on TikTok. They may even download games and pay for them, ultimately becoming core players.

In the thriving content ecology of TikTok, through certain incentives, users can be encouraged to spontaneously create organic content, maximizing the potential for user interaction, generating more interactive UGC for games, and increasing user stickiness.

### Behavior of mobile RPG players on gaming platforms



## Gaming UGC incentive program

- Helps games achieve marketing objectives such as content showcases, UGC mission interactions, user acquisition, and traffic downloads.
- Also suitable for marketing campaigns in different stages, such as pre-registration, new title launches, version updates, anniversary celebrations, and long-term operations.

**Game events and content are aggregated on the TikTok site, maximizing user conversions and exposure.**

**Content-consuming users:** Users who do not create content discover games through incentivized "watch/like" missions.

**Content-producing users:** Users who can create content are encouraged to create UGC through "creative missions" that contribute to brand exposure.

**Core gamers:** Incentivized missions based on game avatars/item redemptions promote downloads, returning users, and user retention among core users (high-potential gamers).

### Hero Entertainment's 《サンローラン騎士団》x Gaming UGC Incentive Program



The new game launched in Japan with massive promotions, unleashing its influence and initially introducing a points leaderboard gameplay to create long-term social assets for the game.

#### The Impact

- 12.7K User-contributed content
- 21K Page views
- 31.5K Game keyword searches
- 18.6M Total views of core game tags
- 2.5K User-contributed content

## Branded Mission

**Branded Mission** supports creators in generating premium content through officially launched events, and rewards them with incentives, consequently bolstering the content library, brand recognition, and creator matrix of games on TikTok.

During the Ramadan period in Southeast Asia, ROO conducted a brand marketing campaign titled "Everyone's First Love". Through the creation of diverse content, ROO's brand presence and popularity consistently ranked in the Top 2.

### #Poringface challenges



### #Poringface interactive sticker effects



420 million  
Total video views during the event period

14k  
Number of users who used Branded Effects

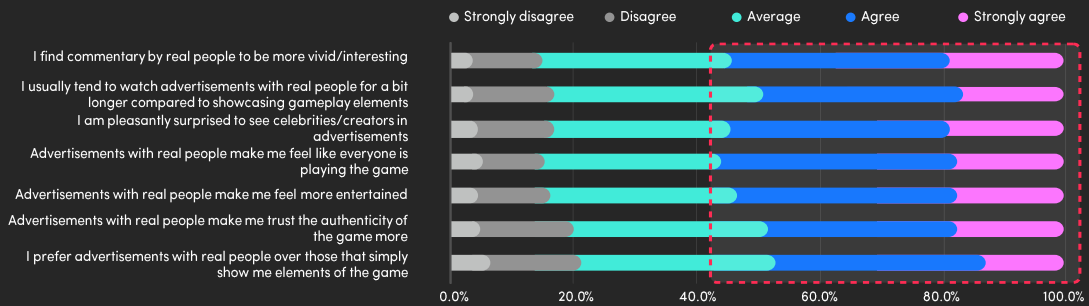
## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

**Content featuring real people:** Creatives which feature real people better interpret the highlights of RPG games, and high-performing content is the key to acquire users.

### From the user's perspective: Creatives which feature real people are more vivid and interesting, thereby resonating with the audience.

According to user surveys, RPG players generally have a positive and supportive attitude toward materials featuring real people. The core elements of advertisements with real people, such as authenticity, entertainment value, and vividness, are also recognized by more than half of all users. Moreover, creatives featuring real people generate stronger interest among users.

Compared to showcasing game elements, how much do you agree with using real people advertisements for the following aspects?



### From a game publisher's perspective: Advertisements with real people are more likely to capture players' interest and allow for faster replenishment of new content.



RPG Publisher A

"Using footage with real people can generate interest in the game, pique players' curiosity, and encourage them to download the game, thereby increasing conversion rates."

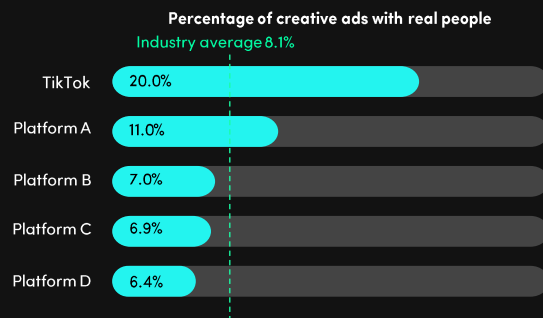


RPG Publisher B

"Replacing footage with real people is relatively convenient. Regardless of the form of the material, as long as you change the person, it becomes a new creative."

### TikTok is the platform with the highest proportion of creatives featuring real people, and the platform's style provides a fertile ground for the propagation of creativity with real people.

The advantage of creatives featuring real people on TikTok: Overall, the proportion of creatives with real people in RPG advertisements on the TikTok platform reaches up to 20%, significantly higher than other platforms. In various key segmented markets for RPGs worldwide, the proportion of creatives featuring real people on TikTok surpasses the average of all other platforms, indicating that the marketing strategy of incorporating real people in ads on TikTok is favored by numerous RPG advertisers.



Proportion of RPG creatives with real people	Europe and US	Japan	South Korea	Southeast Asia
TikTok vs average proportion of all other platforms	+20.8%	+5.9%	+11.3%	+14.1%



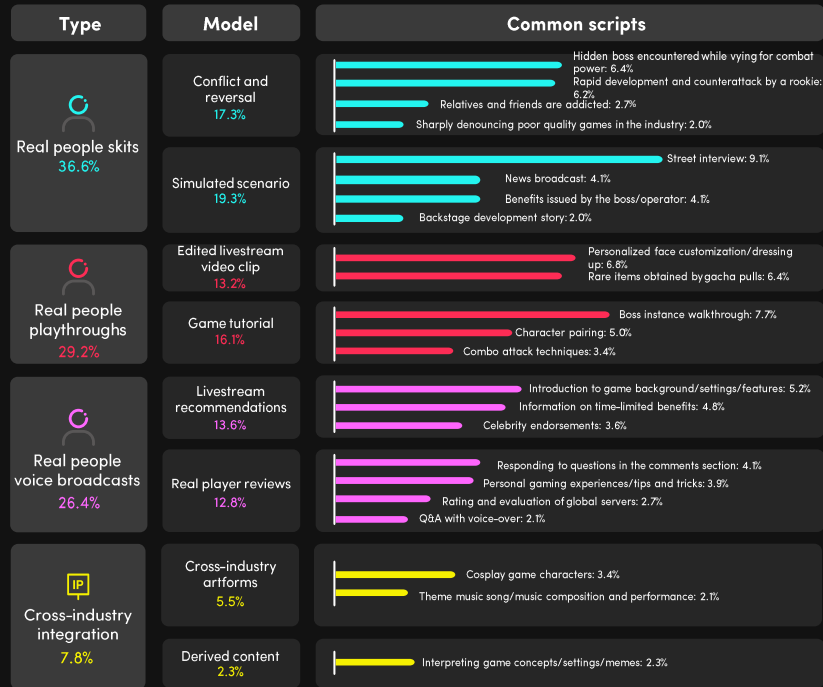
"I think creatives featuring real people can be combined well with TikTok. If we directly advertise using creatives produced by UGC creators, they can be integrated with organic content to make the content more authentic."

## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

What exactly do we do with creatives featuring real people?

Four major ways that creatives featuring real people help RPG games reach a wider audience on TikTok.

Statistical methods: Among RPG advertisement videos with real people monitored by AppGrowing in the past year, 561 advertisements with the highest estimated exposure were selected, and their scripts were identified and counted.



### Real people skits

Time	0-10 seconds	11-25 seconds	26-40 seconds	After 41 seconds
Video content	A woman breaks into the R&D office to negotiate with the leader.	Two people enter the R&D office, with far-fetched scenes of the laboratory and items appear one by one.	The woman obtains items and travels to the game world through a portal.	Features the game's CG film and presents cool scenes from the game.
Creative analysis	Piques the curiosity of the audience with cinematic scenes and dialog.	Through dramatic conflict, gradually reveals a science fiction-like setting and other related scenes.	Taking players through the storyline of the game world creates a sense of connection between reality and virtuality.	The CG short film contrasts with the previous live footage, offering a sense of surprise.
Case study				

### Real people playthrough

Time	0-3 seconds	4-22 seconds	After 23 seconds
Video content	The live streamer appears in the lower right corner, while the screen mainly shows the rich content of the game's characters.	Live 2D portraits of multiple game characters, in combination with commentary and reactions from the live streamer are displayed.	Catchy slogans and eye-catching buttons make users want to download the game.
Creative analysis	Real people commentary and authentic playthrough reactions create a sense of connection.	The intimate video livestream format creates interest and resonance with the advertisement.	The logo reinforces brand impression, while featuring real people generates interest in downloading the game.
Case study			

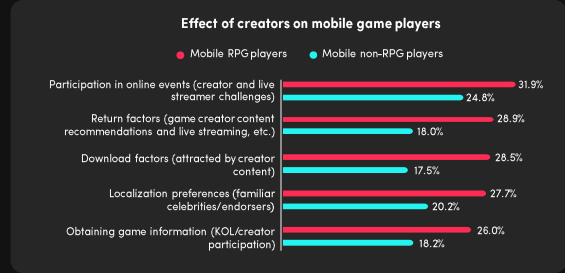
## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

**Diverse creators:** The reputation of creators drives RPG games to reach more people and expand the influence of the game with the help of diverse content.

**Creator content is very popular among users, and fun and innovative content accelerates the localization of the game.**

**Creator content has a powerful impact on RPG players:**

RPG users pay more attention to creator content, and in many markets this content has become the key to attracting users to download games, return to games, and participate in game-related activities. The fun and creative content generated by creators enjoys strong popularity among users, accelerating the localization of the game.



**RPG Publisher A**

**Acquiring core users:**

"Creators represent a vertical user resource. According to TikTok's relevant data, we can know the characteristics of the user group behind the creator, and then help products to better reach their core group of users."

**RPG Publisher B**

**Boosting the success rate of localization:**

"Creators can assist products in better acquiring local users, such as finding local creators in Southeast Asia to explain game content and produce creatives, which can more easily attract local users."

**RPG Publisher C**

**Rich creative gameplay:**

"TikTok finds a wide range of creators to help expand the product's global market and create rich content based on relevant gameplay. Creators also take the initiative to engage from more creative dimensions in terms of collaboration, thereby increasing the exposure of the partnership."

**TikTok creators can better help games acquire users from multiple groups.**

**Rich creator resources:**

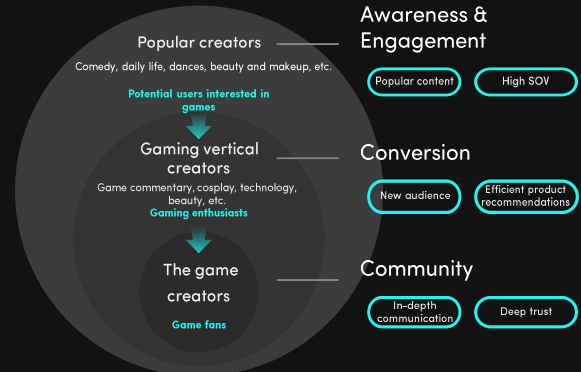
TikTok gathers rich creator resources. Regardless of the type of creator the core users pay attention to, such as game streamers, players, or pan-entertainment creators engaging users from different groups, TikTok has more diversified creator resources to help advertisers acquire users outside of their core group.

**Acquiring core users across vertical market segments:**

TikTok has a large number of game creators whose performance aligns closely with the characteristics of the game itself. Leveraging the influence of these creators helps expand the game audience and enables targeted outreach to the core users of the game.

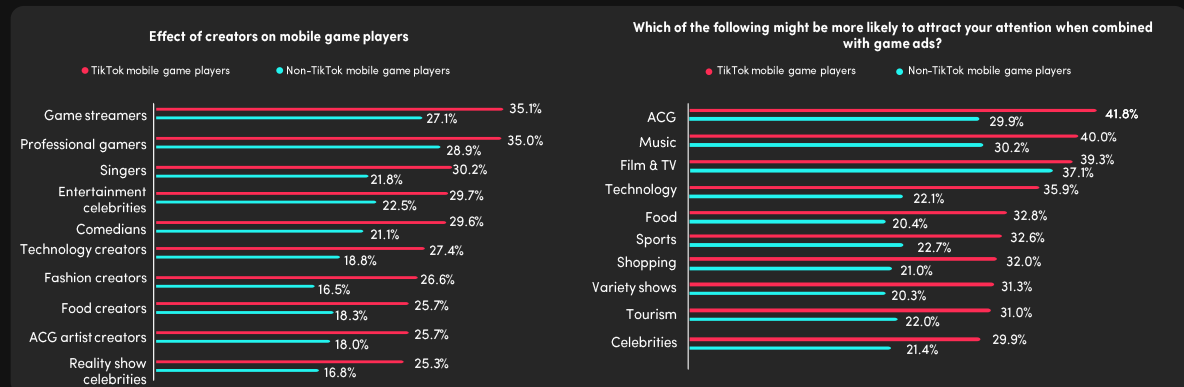
**Full penetration of potential users from other groups:**

The RPG product itself, given elements such as ACG, IP, and engrossing storylines, is inherently well-suited to overcome barriers. With the aid of TikTok pan-entertainment creators, game elements can be combined with multiple entertainment formats to break into new user groups.



TikTok users pay more attention to creators: Compared with non-TikTok users, TikTok users give a higher proportion of their attention to game streamers and game players, and consistently give a high degree of attention to content posted by creators.

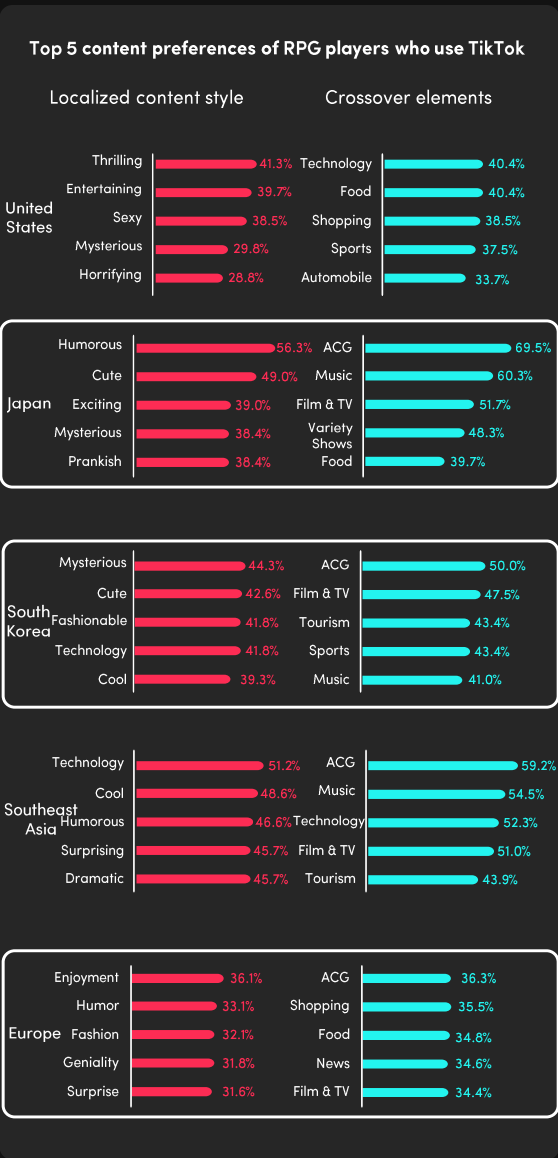
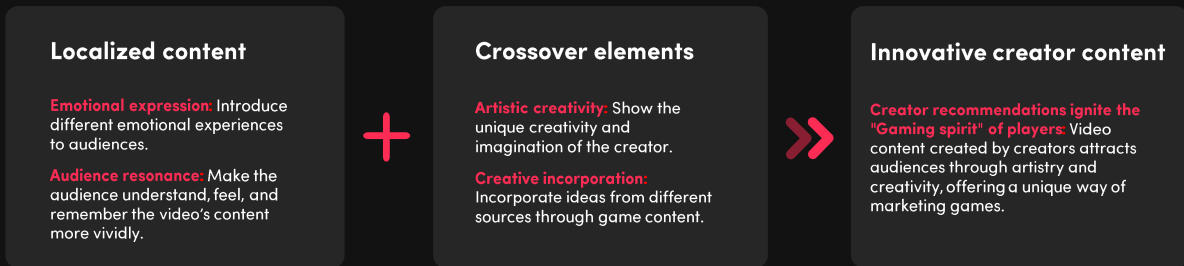
TikTok users are more tolerant of diversified creative formats: In terms of game content, TikTok users pay more attention to diverse game creatives than non-TikTok users, and their potent eye-catching effects can be better realized through a combination of ACG, music, film and television, technology, and creator content.



Data source: Gamma Data (CNG)

## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

Localized content + Crossover elements are used to create TikTok creator content that expands the game's influence.



### Japan - Cute style + ACG elements



**Game creator real-time reactions**

**Video content:** A female live streamer participates in the 10th anniversary gacha pull event of Monster Strike. As she unexpectedly draws a rare character, she's taken aback and keeps shouting as she looks at her mobile phone, reacting in an endearing way. Fixed portraits of game characters are shown at the top and bottom of the screen.

**Creative Tip:** Reach player groups more precisely through game creators. The exaggerated and cute real-time reaction of the female live streamer creates a sense of inclusion and also sparks the audience's desire to try out the game.

### South Korea - Mysterious style + Musical elements

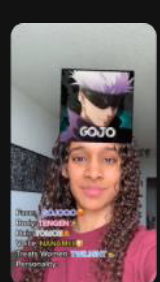


**New renditions of theme songs by music creators**

**Video content:** The creator uses the marimba to perform a cover of the theme song from Lineage 2M. The ethereal sound and female vocals create a sense of mystery and power, infusing a unique feeling unlike the original song.

**Creative Tip:** High-quality professional music content can trigger an emotional resonance with the audience and create a deeper connection with the game brand.

### Europe - Humorous style + ACG elements



**Randomly occurring ACG characters are used to test for Mr. Right.**

**Video content:** The creator uses randomly occurring ACG characters to test the characteristics of her future boyfriend and has an ecstatic reaction when the test results show her favorite ACG characters.

**Creative Tip:** Due to its randomness, this kind of content can record the creator's most natural reactions, making the content extremely appealing. Loyal followers may also try again and again until they get a satisfactory answer, thereby reinforcing the IP's impression and generating more shares.

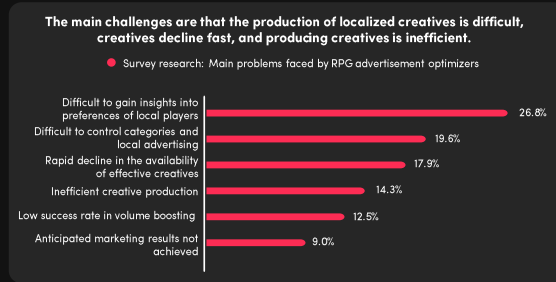
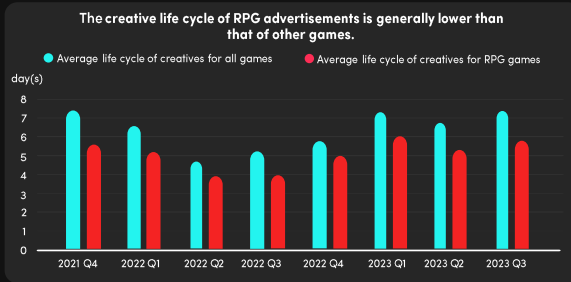
Data source: TikTok Creative Center, AppGrowing

## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

### Creative product recommendations -- TTCC, TTCX

#### Challenges currently faced by RPG creatives

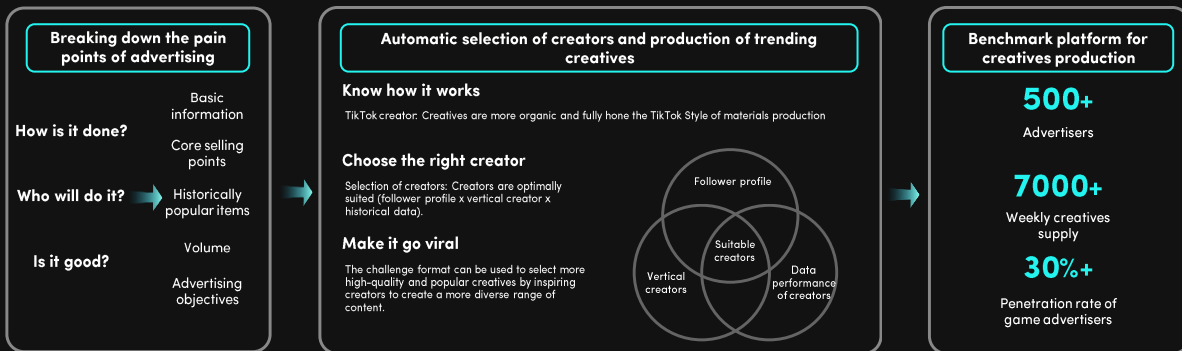
Currently, RPGs are facing many pain points, such as issues with the rapid consumption of content and challenges in creative production, which exacerbate difficulties with user acquisition. Therefore, it is necessary to pay attention to related products that can address the challenges of producing creative materials and leverage a more efficient creative production process.



#### TTCC offers creator-produced creatives at scale for performance ads and solve creative difficulties.

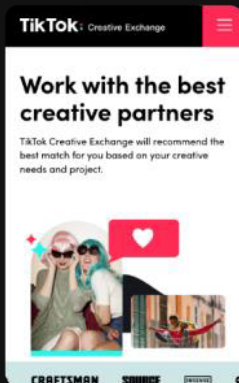
TikTok Creative Challenge provides high-performing and easy-to-use creative content, at scale, for performance-driven advertisers.

Structuring the demands + automating creator selection = scaling up the production of TikTok trending creatives



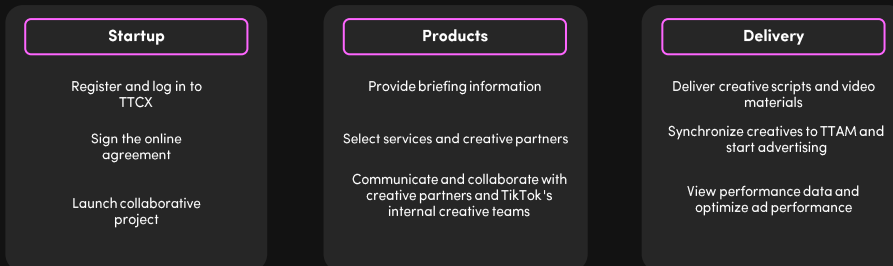
\*TTCC only supports English creatives at present.

#### TTCX: A one-stop creative tool used for better production of high-quality creatives.



TikTok Creative Exchange (TTCX) is a one-stop creative service platform that enables fast and scalable creatives production and offers a great number of high-quality advertisement ideas specifically designed for TikTok, enhancing the performance of promotional events.

TikTok Creative Exchange helps advertisers connect with creative partners to create native-looking creatives for ad campaigns. Additionally, it will also recommend the best matches for advertisers based on creative needs of the project.



\*TTCX supports global languages

Data source: AppGrowing

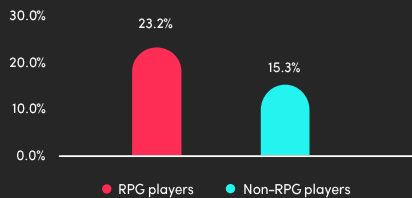
## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

**Reaching more users through livestreaming:** Creator livestreaming provides new opportunities to reach a wider audience and expand brand volume by attracting users' attention.

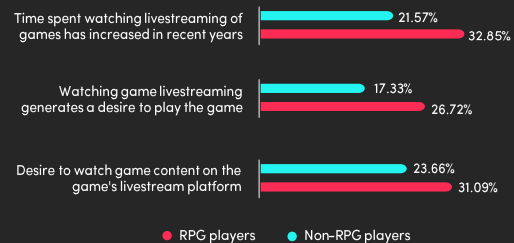
As an important part of building a game content ecology, livestreaming not only drives traffic to the product during the user acquisition stage, but also becomes an integral part of the creative strategy for acquiring and managing a larger following. The expansion of the game livestreaming ecosystem presents an opportunity to attract the attention of more users. RPG users have a stronger willingness to watch and engage in livestreaming, and tend to be more interested in games which can expand their influence through livestreaming.

- RPG players demonstrate a strong inclination towards livestreaming: RPG players demonstrate a more willing to engage in livestreaming, and users are more likely to become organic content producers.

Willingness of mobile game players to engage in livestreaming

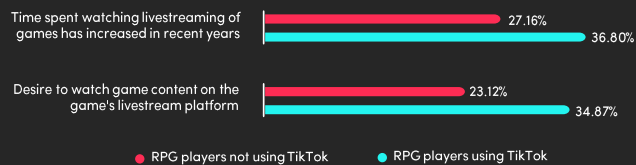


- RPG players demonstrate a strong willingness to watch livestreaming: They regularly get game-related information from content shared in game livestreams and download games through these livestreams.



### TikTok users demonstrate a strong willingness to watch livestreams.

TikTok's RPG players demonstrate a stronger willingness to watch livestreams and spend more time watching livestreaming content.



## More creative possibilities are derived from TikTok livestreaming.

Content consumption +  
**Attracting viewers to watch livestreams**

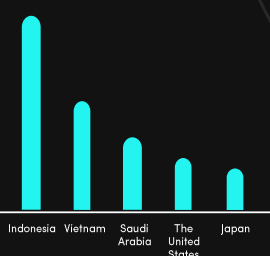
**180 million**

Average monthly views of game livestreams

**62%**

TikTok users watch livestreams every day

Top 5 markets for watching game livestreams



Content creation +

**Launching compelling livestreams**

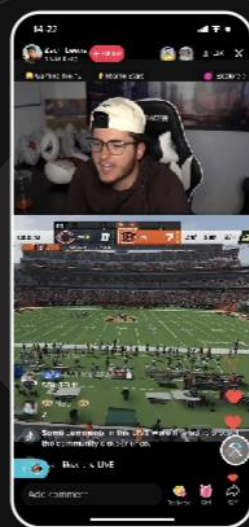
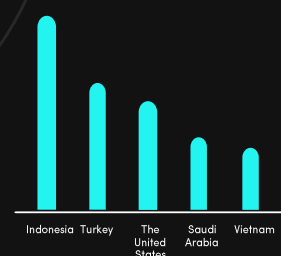
**1 million**

Average monthly game livestreams on TikTok

**+16%**

Growth rate of livestream creators on TikTok

Top 5 game livestream markets



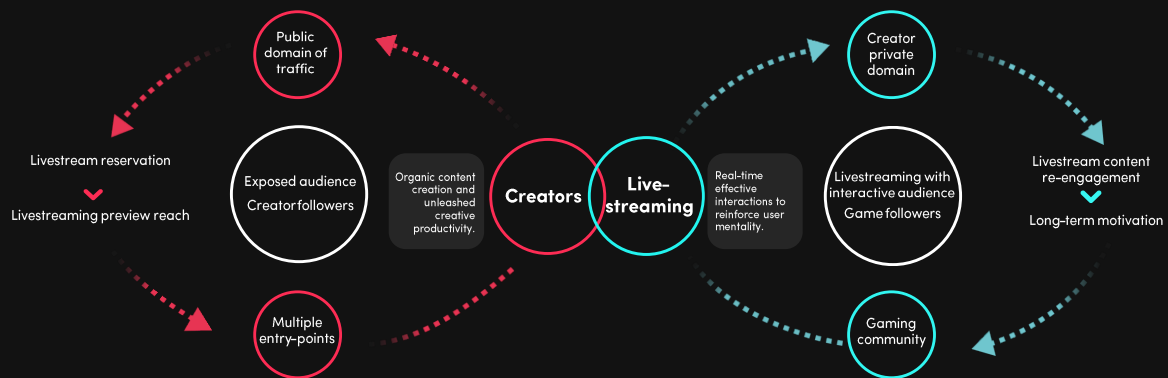
Data source: Gamma Data (CNC), TikTok data



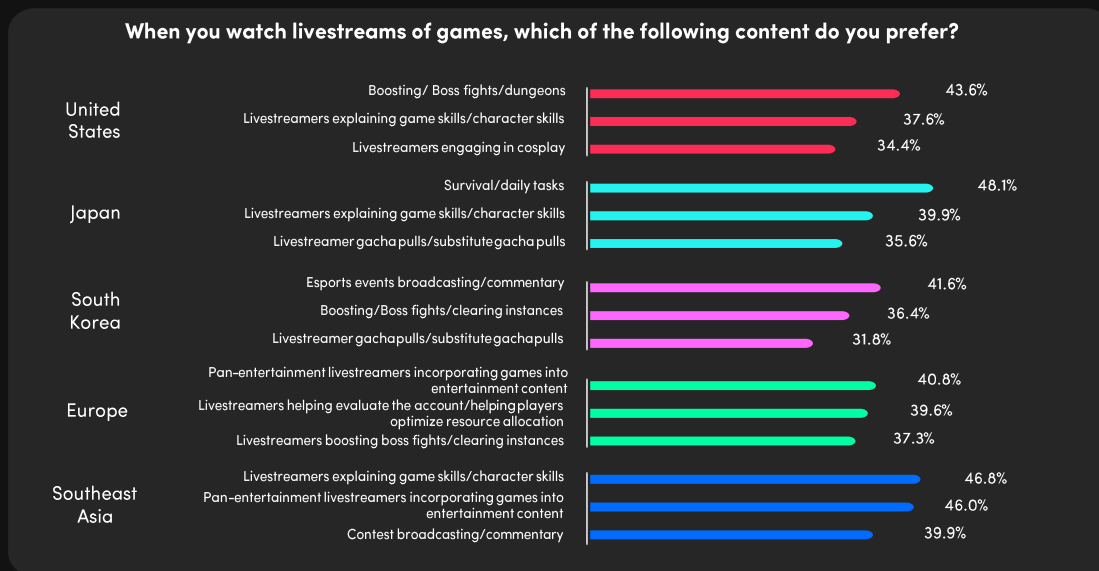
## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

**Reaching more users through livestreaming:** Creator livestreaming provides new opportunities to reach a wider audience and expand brand volume by attracting users' attention.

Creator livestreams achieve breakthroughs in attracting more users and create a virtuous growth cycle.



Based on the strong correlation between livestreaming and creators, it is also necessary to focus on the preferences of RPG players in different regions worldwide in terms of livestreaming content and combine content characteristics with creator attributes to improve the effects of livestreaming and user acquisition.



### Differentiated market preferences for livestreaming content:

- From the perspective of global user preferences, game skills/character skills/boss fights/dungeons as explained by livestreamers are the preferred type of game content across multiple regions.
- From the perspective of preferences in different regions, Japan has a high preference for survival/daily tasks, but a low preference for competitive elements; South Korea and South Asia, on the other hand, show a strong interest in competitive elements, such as livestreaming events and player versus player (PK) content.
- In the United States, Europe, and Southeast Asia, incorporating the characteristics of the game's livestreamers to reach more people is necessary. For instance, incorporating cosplay content may be effective in the United States, while pan-entertainment content may resonate strongly in Europe and Southeast Asia.

## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

**Community management:** Establish connections with users through business accounts and leverage followers to cultivate long-term value in the community.

The role of community management has gained recognition and serves the diversified needs of users: The survey shows that community management has important value for RPG games, especially in terms of driving business and fostering long-term users. In addition, this area is also an important resource for users to carry out activities ranging from pre-registering and downloading games, to obtaining walkthroughs and interacting with the official account, and has become a key element for linking and gathering users.

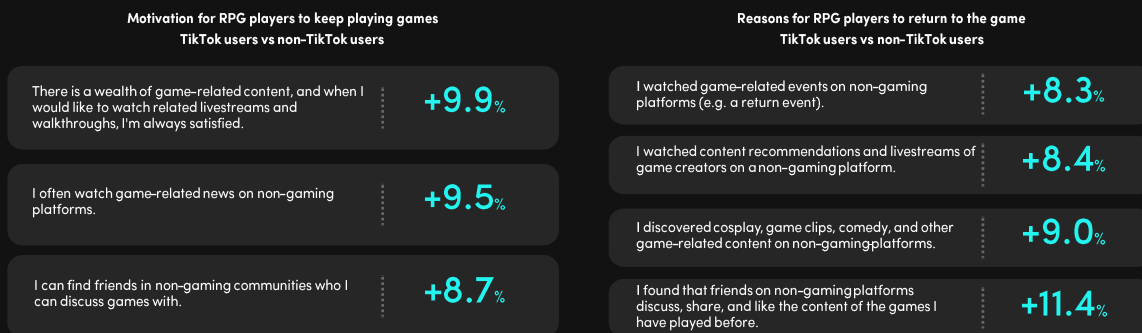
A  
RPG Publisher A

"We are aware that some renowned companies have an advantage in community management, as the popularity of the community continues to surge when new content is introduced, transforming it into a catalyst for product marketing."

B  
RPG Publisher B

"The premise of leveraging the community well is that your product has long-term content, and you can continue to retain users with your gaming content. Therefore, the most cost-effective method is to develop the community and create high quality content to truly grow the value of users."

TikTok RPG players prefer to discuss games with friends in the community and are more willing to return through community events. Therefore, creating and operating a community on TikTok, coupled with the development of more organic content, can effectively contribute to maintaining user retention and increasing returning players.

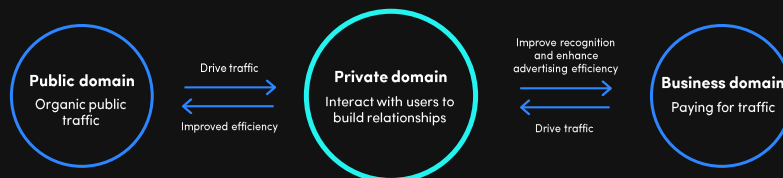


### TikTok business accounts enable publishers to produce and spread content and attract and manage followers.

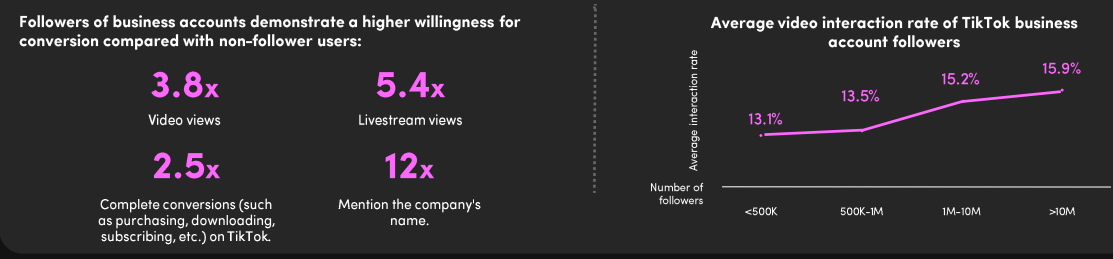
**Main core values of business accounts:**

Through content recommendation mechanisms, users who are more in line with the brand's needs accelerate continuous communication with the target user group, gather high-value followers and users at a low cost, and explore long-term business value.

**Content (public domain) + marketing (business domain traffic) + interaction (private domain) work together to create the brand's marketing strategy:**



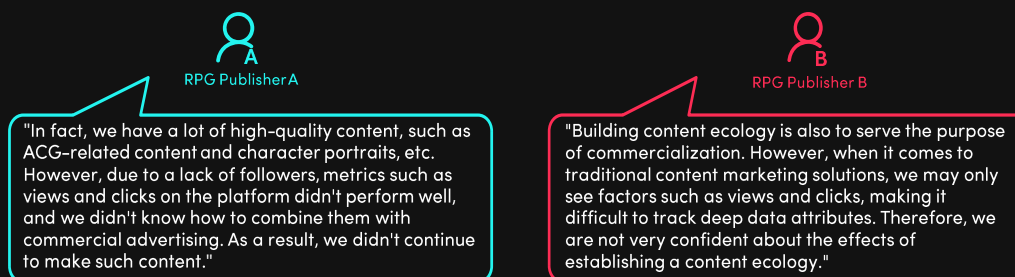
### Business accounts help publishers foster long-term value players, and followers of business accounts have higher interactive conversion values.



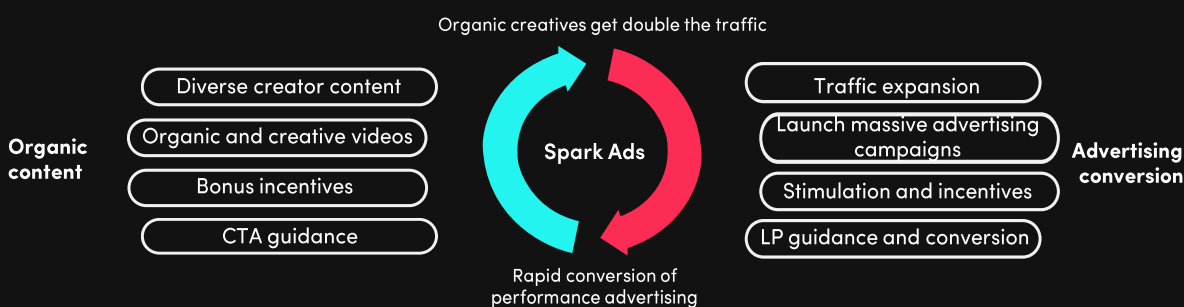
## 2.5 Insight 5: Creating high-quality content can alleviate the pressure on user acquisition costs, and leveraging the content ecology is vital for the growth of RPG games.

“ Create high quality content and combine "organic traffic + paid traffic " to achieve a synergy where "1+1>2".

**From the perspective of game publishers:** Keep exploring ways to combine organic content with advertising traffic. This process is critical to reduce costs and acquire more users.



**Popularize organic content on TikTok and combine organic traffic with paid traffic to reduce costs and increase efficiency.**



### 1. Improve competitiveness of ads:

- Improve view-through rate and reduce CPV and CPM. Compared to non-Spark Ads, Spark Ads have a more competitive advantage in the following key indicators.

-57%	2-second CPV	2-second view-through rate	+102%
-157%	6-second CPV	6-second view-through rate	+157%
-14%	CPM	VTR	+134%

### 2. Reduce ad conversion costs:

- Increase CVR to reduce ad costs

Spark Ads vs non-Spark Ads

Landing page visit rate	+20%	Cost per action	-37%
CVR	+10%		

Spark Ads brand new UI vs old UI

CVR	+69%
CVR/CTR	+7%

### 3. Increase users' willingness to pay:

- Improving trust:** Accounts are more authentic, and content is more native, making it easier to build players' trust up to the payment stage.
- Advanced player reach:** Audiences are exposed to organic content matching their preferences ahead of time, reducing the interference of subsequent advertisements on their overall experience.

### 4. Enhance long-term value:

- Business account operation and conversion:** Utilizing business accounts to publish videos can enhance fan retention, convert followers, and cultivate core players.
- Better user experience:** By offering an improved player experience, 78% of players agree that brands that share creative content and interact with players on TikTok are attractive brands.

The Spark Ads + KOC format can help game advertisers generate batches of creatives suitable for Spark Ads, leveraging creators' content to drive organic traffic. By combining Spark Ads and performance ads, both exposure and conversions can be effectively achieved, finally optimizing the entire conversion and improving ROI.

Data source: TikTok case study data

# 03

## Global Market

### Insights of RPG

# Games

- Although there are certain common features in the overall development of RPGs worldwide, there are significant differences in regional markets. Understanding the localized characteristics of players in different markets is crucial to the success of RPG games.
- To better plan game marketing, companies need to understand the challenges and opportunities of entering specific markets, as well as the creative trends and popular organic trends in different markets.



## 3.1 Market overview

		Market characteristics	Takeaways
United States	Casual gameplay market	<ul style="list-style-type: none"> <li>The RPG market has potential, but PC and console games have an impact on mobile games.</li> <li>Players have low long-term retention and low interest in core gameplay.</li> <li>There are opportunities in multiple niche themes such as science fiction, urban, and cyberpunk themes.</li> <li>Casual gameplay can reduce the pressure of competition, while the match 3 RPG format offers more opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>American RPG players exhibit strong sociability, while TikTok can serve as a community to meet their needs for interaction and communication.</li> <li>American match 3 RPGs can expand their casual appeal by integrating TikTok with scenario-specific dramas.</li> </ul>
Japan	Content-driven market	<ul style="list-style-type: none"> <li>Its RPG market is the largest in scale among global markets but is starting to decline.</li> <li>Players are less keen on social interaction, so it's crucial to emphasize the fun of single-player games and the quality of art styles.</li> <li>Additionally, attention should be paid to the quality of character portraits in games.</li> <li>While the market's preference for ACG is the highest, the competition is intense and card RPGs are the most preferred category among players.</li> <li>Games with simpler gameplay present more opportunities in this competitive landscape.</li> </ul>	<ul style="list-style-type: none"> <li>Japanese RPG players exhibit a high demand for game content. In addition to enhancing their content, games can also utilize TikTok to provide additional content and expand their influence.</li> <li>Japanese card RPGs attract their target audiences on TikTok by combining character portraits and BGM effects.</li> </ul>
South Korea	Magic-themed MMORPG market	<ul style="list-style-type: none"> <li>The RPG market, while large in scale, has experienced a significant decline, and product experiences have become ossified.</li> <li>Players have higher demands for improving battle ratings.</li> <li>The average per capita spending level is among the highest.</li> <li>There are still opportunities for classic ARPGs and shooter RPGs.</li> <li>Magic-themed MMORPGs present a key opportunity, while war, martial arts, and urban categories have growth potential.</li> </ul>	<ul style="list-style-type: none"> <li>Korean RPG players have a strong demand for watching livestreams. Games can leverage TikTok livestreams to reach diverse audiences.</li> <li>Korean magic-themed MMORPGs can combine celebrities and creators on TikTok to enhance elements of magic and competition.</li> </ul>
Southeast Asia	Interactive and event-driven market	<ul style="list-style-type: none"> <li>Due to competition across different game categories, the performance of RPGs has declined slightly.</li> <li>Local gaming equipment, network environments, games packaging, and other technical conditions are complex.</li> <li>Players have ample gaming time, and there is a significant variation in local gaming preferences.</li> <li>Players enjoy engaging in multiplayer gaming experiences.</li> <li>MMORPGs align with the preferences of Southeast Asian players and can be approached from multiple themes.</li> </ul>	<ul style="list-style-type: none"> <li>Southeast Asian RPG players have a stronger desire for interactive engagement. Games can leverage TikTok's interactive creativity and localized events to expand their influence.</li> <li>Southeast Asian MMORPGs: Combine live-action dramas and character combat on TikTok to showcase the excitement of competition.</li> </ul>
Europe	Turn-based RPG market	<ul style="list-style-type: none"> <li>The market size is declining rapidly, and there is intense competition from other game platforms.</li> <li>More emphasis is placed on local culture and history.</li> <li>Localized marketing can be performed by collaborating with local creators and incorporating cross-over elements.</li> <li>To address the competition from other game platforms, an opportunity lies in classic turn-based RPGs.</li> </ul>	<ul style="list-style-type: none"> <li>Europe is characterized by a strong degree of localization and cultural diversity. Collaborating with TikTok creators can create more innovative content to expand the game's reach to a broader audience.</li> <li>Turn-based RPGs: Utilizing diverse creators and providing gacha pull benefits can effectively stimulate player conversions.</li> </ul>
Brazil	Open-world RPG market	<ul style="list-style-type: none"> <li>The market size has slightly declined, but there are substantial potential opportunities.</li> <li>There is a high preference for ACG and players value story-related elements.</li> <li>In addition, players have a strong affinity for freedom, indicating that open-world RPGs have greater potential.</li> </ul>	<ul style="list-style-type: none"> <li>Brazilian players value real-people content and musical elements, and TikTok has a higher proportion of real-people materials and rich music content.</li> <li>Open-world RPGs: Combine voice-overs, BGM, and casual content on TikTok to showcase the freedom and exploratory nature of the game.</li> </ul>
Middle East	Highly competitive market	<ul style="list-style-type: none"> <li>The RPG market is relatively small and crowded out by categories such as strategy games, however, there is potential for expansion in the future.</li> <li>Players have a preference for competitive experiences and pay more attention to combat power.</li> <li>Moreover, they are more willing to spend excessive time and money to improve their combat power.</li> <li>Since they have a higher level of familiarity with strategy games, this indicates a good opportunity for strategy RPGs.</li> </ul>	<ul style="list-style-type: none"> <li>Middle Eastern players regard in-game skills and development as the core factor in making in-game payments, and TikTok has gathered a large base of players willing to make in-game purchases.</li> <li>Strategy RPGs: Combining real-action short skits and live combat content on TikTok can showcase competitive gaming experiences.</li> </ul>

## 3.2 Insights into the US market

### Market challenges

The market size has growth potential, but there are multiple challenges in entering the market.

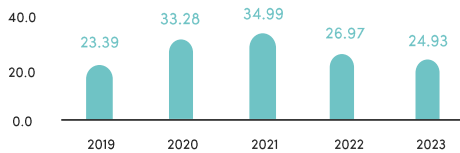
- Difficult to penetrate the top-tier gaming market:**

In comparison to other markets, the RPG market in the United States is defined by a few games that generate high revenue. **A lot of RPGs find it difficult to attain a top-tier position and face multiple challenges when entering the market.** However, from the perspective of user preferences, American players do not reject RPGs outright. For example, among RPG players in the United States, the proportion of those who have been playing an RPG for the past six months and have a high degree of interest is 1.18 times higher than players in general.

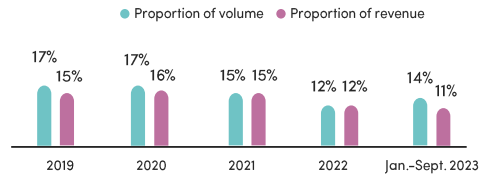
- The impact of other platforms on mobile games:**

**Other platforms (such as PC and console) also divert RPG players from the mobile gaming sector.** In terms of scale, the United States boasts a substantial number of PC and console players. Data statistics show that by 2023, North American console players will make up 39.3% of players globally, with the US market exhibiting a particularly dominant position. Other platforms have advantages in terms of screen size and gameplay experience. For instance, ARPG games emphasize gameplay experience, and the feedback provided by PC and consoles is superior to that of mobile phones. This can lead to player diversion, which has an impact on mobile games.

Market size of RPG mobile gaming industry in the United States (USD 100 million)



Proportion of RPGs in Top100 mobile games in the United States



### The overall spending level among RPG players is not as high.

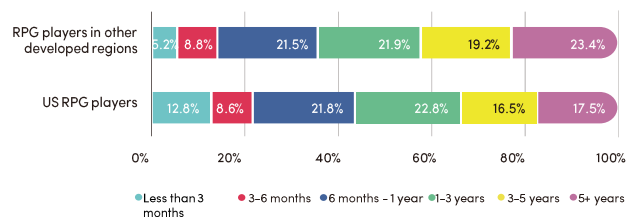
- Compared to RPG players worldwide, the overall spending level for players in the United States is unremarkable. Both the proportion of paying players and the proportion of high-spending players are lower than the overall average level.

	Proportion of whales by payment	Proportion of high-frequency paying players (Monthly average of 3 or more payments)
United States	8.1%	45.5%
Compared to the overall level	-15.7%	-7.7%

### Players are less willing to be retained in the game for a long time.

- Compared to RPG players in other developed regions, RPG players in the United States are less willing to be retained in the game for a long period of time, with over 40% of players playing for a maximum of 1 year.
- Therefore, games that prioritize long-term user acquisition may face challenges in the United States, while some medium-term to short-term RPG games may achieve better results. Moreover, medium-term to short-term games inherently have lower costs and reduced pressure in terms of user acquisition, which strategically combined with casual gameplay, offers a solution to address market challenges.

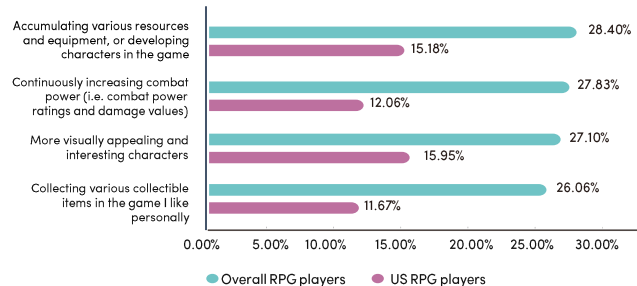
Among the mobile game you're playing, what is the longest duration you've played a game for?



### Lower interest in the core gameplay elements of RPGs.

- Compared to general RPG players, American RPG players have a lower interest in the core gameplay elements of RPGs, such as character development, item collection, and combat power. As a result, there is relatively limited user acquisition potential for conventional RPGs in the American market, and it is necessary to rely on innovative gameplay to acquire users.

In terms of RPGs, which of the following game elements are you more interested in?



Data source: Gamma Data (CNG)

## Market opportunities

### The game's point of interest

Focus on opportunities in sci-fi, urban, and cyberpunk themes.

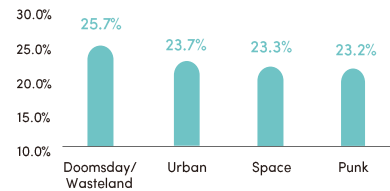
- Strong preference for sci-fi themes:**

Science fiction has long been a preferred theme among American players, influenced by their advanced technology and thriving film industry. In recent years, there has been a trend towards more detailed categorization of games. In addition to the sci-fi genre, companies also need to pay attention to the specific audiences of themes such as doomsday, space, mecha, and zombies.

- Urban and cyberpunk themes have great potential:**

The preference for urban and cyberpunk themes by players is to a certain extent influenced by other elements. For example, with the influence of "Cyberpunk 2077", some cyberpunk-themed games have been recently released, and it is expected that the potential of this category will gradually be unleashed.

Preference of themes among American RPG gamers



Casual gameplay can reduce competitive pressure and create more opportunities for match 3 RPGs.

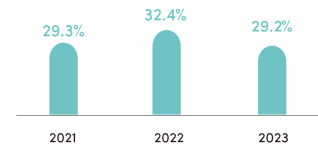
- Casual gameplay has a high market share:**

In recent years, casual gameplay has consistently accounted for about 30% of the Top 100 revenue-generating mobile games in the US market.

- RPGs can be blended with casual gameplay to attract players:**

In the United States, RPG players have a higher preference for shooter games (42.6%), casual tile-matching games (24.9%), puzzle games (23.2%), and racing games (20.0%), among other categories. All of these gameplay styles can be combined with the RPG format as casual gameplay to create broader and more diverse audiences.

Proportion of casual gameplay in Top 100 U.S. mobile games by revenue (excluding gambling, chess and card games)

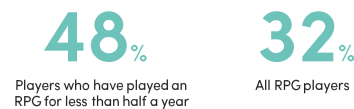


- There are more opportunities in match 3 RPG games, which blend casual and cultivation gameplay:**

The match 3 RPG sub-genre is typically representative of emerging categories, and nearly half of players with less than half a year's experience in RPGs have played such games.

Match 3 RPGs combine the leisure of tile-matching games with RPGs' character development systems, wherein the former mainly provides a fresh and exciting combat mode, with RPGs' character development systems and competition at its core. For example, the core payment element of some games is still the character gacha, which is a typical payment point for such games, and the acquired character affects the damage of the "match 3" mode in the combat section.

Proportion of American players who have played a match 3 RPG (by time of first play)



**Tips:** Based on the opportunities presented by match 3 RPGs in the United States, now the focus should be put on analyzing how this category can better utilize TikTok to acquire users.

### Points of interest on non-gaming platforms

RPG players in the United States have a strong demand for socialization, and creating a platform outside of the game can promote player interaction.

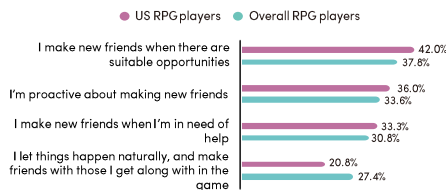
- More socialization:**

Compared to other markets, American players have a stronger need for socializing within games and are more inclined to make friends and meet like-minded individuals while gaming. 77.2% of American RPG players have a preference for social elements, which is 11% higher than the global average.

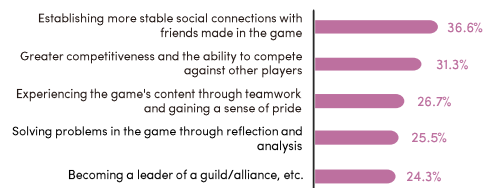
- More eager to build stable social relationships:**

Approximately 36.6% of players hope to establish more stable social relationships with friends they meet in games. Top 3 preferences of players are all related to socializing and team collaboration within gaming experiences.

Which of the following statements best describes your situation in terms of making new friends in games?



Which mobile game experiences are important to you?



**Non-gaming platforms provide more social opportunities:**

American RPG players are more eager to find companions to explore the game together and discuss questions they have. However, over 38% of American players believe that non-gaming platforms help them find gaming companions and provide answers to many of their doubts. Building a gaming community on non-gaming platforms plays a more positive role in enhancing the social experience for American players.

Data source: Gamma Data (CNG)

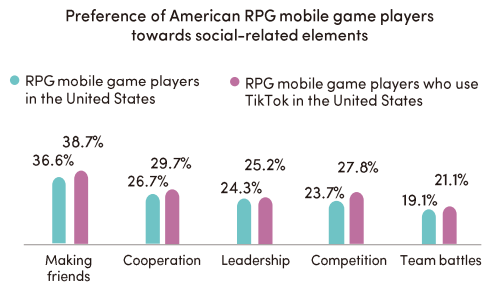
United States

## TikTok meets the interaction and socialization needs of RPG players in the United States

TikTok has rich communities, which allow players to communicate and interact better and this in-depth content provides players with more useful information. 30.1% of players believe it is easier to find gaming partners on TikTok, and 28.5% of players believe it is convenient to share gaming experiences with others through TikTok. In addition, TikTok players also demonstrate a stronger preference for sociability, and companies can find more social and interactive players on TikTok.

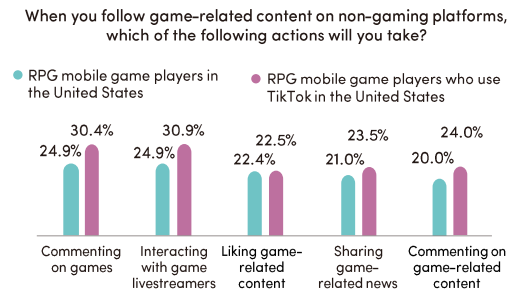
- TikTok players have a higher preference for socialization in games:**

A comparison between TikTok players and other players shows that American TikTok RPG players have a higher preference for making friends, cooperation, and team fights, demonstrating a stronger overall preference for social gaming behavior.



- TikTok players prefer social interactions outside games:**

American TikTok RPG players tend to express their opinions on the game, often interact with game streamers, and are more inclined to share and comment on the game's content, therefore demonstrating a higher level of interactivity.



- Activating the community in TikTok to engage American gamers:**

American TikTok RPG players are highly interactive, and they tend to build follower communities on TikTok in combination with business accounts to effectively produce and disseminate game content, attract and manage followers, provide players with more opportunities for interactive communication, and give play to the power of followers.

TikTok enlivens the RPG community and improves the interactive stickiness of players.

**30.1%**

of RPG players believe TikTok is helpful for them to find game partners

**28.5%**

of RPG players believe TikTok facilitates game communication

## Embrace the community and create localized content featuring creators.

- There is a high preference for content featuring real people and creators:**

American RPG players have a higher preference for real-people advertisements than players from other regions, and they prefer real-people advertising content rather than showcasing game elements. In addition to real-people content, 34.75% of players are more interested in creator recommendations. With the help of real people and creators in delivering the selling points of the game, player interests can be effectively stimulated.

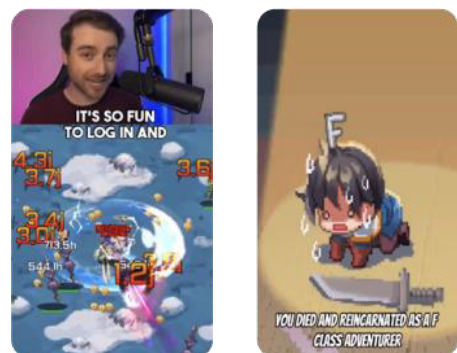
- Developing localized content on TikTok to resonate with players:**

Among content preferences, RPG players are most concerned about content integrated with local features (35.38%). Publishers can rely on TikTok Creative Challenge (TTCC) activities to integrate creators' content with local characteristics, and use elements such as tips and tricks, reward recommendations, player evaluations, and story twists to create player resonance and facilitate marketing conversions.

RPG players' level of acceptance for real-people advertisements

Statement	US vs. overall level
I prefer advertisements with real people over those that simply show me elements of the game.	+13.82%
I usually tend to watch advertisements with real people for a bit longer compared to showcasing gameplay elements.	+10.01%
Real-people advertisements make me feel like we are all playing this game.	+7.21%
Advertisements with real people make me feel more entertained.	+6.96%
I am pleasantly surprised to see celebrities/internet creators in advertisements.	+5.43%

Case: EK Games F Class Adventurer X TTCC



Through TTCC, creators produce 70+ creatives and more region-specific creative content that piques the interest of players and creates resonance. By using TTCC, CPI is reduced by 35% and ROAS is increased by 27%.

Data source: Gamma Data (CNG), TikTok case study data compilation

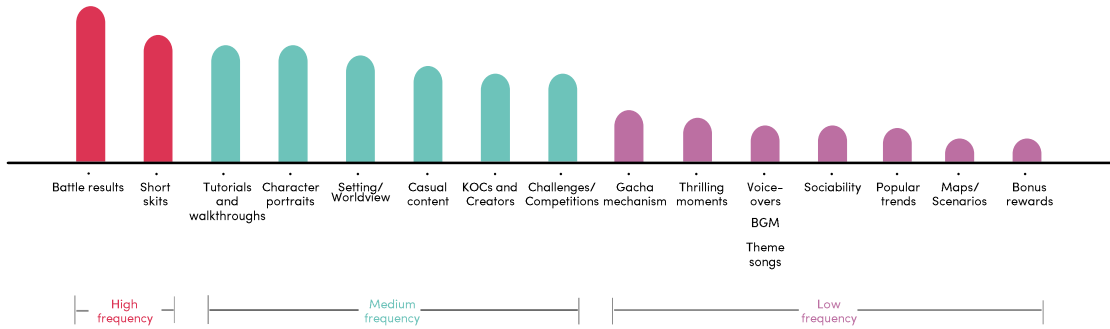


## American match 3 RPGs: Expanding the selling points of casual games by integrating short skits on TikTok



Which creative elements on TikTok can be combined to achieve better results?

### Selling points of performance ad creatives of top games on TikTok\*



### Combination of creative selling points:

Creative combinations	Creative content	Target audience
1 Short skits + Voice-over	» Incredible stories from a first-person perspective, with a voice-over describing the person's inner thoughts in sync, makes the creative's plot more immersive.	» Immersive content makes it easier for audiences who enjoy the plot in greater depth to resonate emotionally and stimulate their curiosity about the game's world.
2 Walkthroughs and tutorials + Challenge/Competition	» The content showcases the low barrier of entry to the game through simple actions such as tapping, connecting, and other operations, while emphasizing the "easy to learn but difficult to master" characteristic and presenting the challenges within the game.	» This creative considers the needs of players at different levels, so that inexperienced players feel more confident to try the game, while advanced players are inspired to challenge themselves.
3 Character portraits + Battle results	» With a battle scene as the background, players are required to match tiles of different colors, so that game characters can cast different skills to inflict harm on the boss, accompanied by rich special effects on the screen.	» Emphasize the game's exceptional performance across various aspects, including artwork and in-game scenes, to meet the expectations of experienced players regarding the game's graphics and special effects.
4 Creators + Casual content	» A creator draws cartoons of their favorite game characters, providing a sense of calm and relief from everyday stress through a relaxed painting process complemented by pleasant BGM.	» This format primarily targets young players who pursue relaxation and prefer casual experiences in games; the creator's vibe and emotional interpretation are more in line with young people's content preferences.

### Case study of creatives:

#### • Short skits + Voice-over

CTR Top: 17%

Opening	Middle	Ending
Emphasizing the voice-over, "There's something in the room, did you see it?" immediately piques the curiosity of the audience, with the first-person-view camera increasing the sense of immersion.	After searching around, players will find a dragon from the game's world in the room. The voice-over transitions into an exhilarating and thrilling tone, further stimulating the audience's emotions.	The dragon disappears in a blink of an eye, and then suddenly leaps towards the camera. The sudden leap frightens the audience and intensifies the psychological impression.

#### • Character portraits + Battle results

CTR Top: 22%

Opening	Middle	Ending
The character is equipped with various items. As the equipment gradually takes shape, the character's portrait becomes increasingly alluring.	When entering the game screen, it displays the match 3 gameplay, where eliminating different pieces generates various attack effects.	After successfully defeating the boss, the character portrait appears again on the screen, simultaneously showcasing the brand and the CTA button.

\*Selling points of creatives of top games on TikTok in the past year, excluding organic content.

United States

Hot TikTok hashtags can be incorporated with US match 3 RPGs:

What hot content on TikTok can be used as creatives?

Search for creative inspiration from the following hot hashtags!

Hashtag	Views	Potential hashtags	Notes	Changes in player interest	
#cosplay	4 billion views	1	<p><b>#comedysketch</b></p> <p>Comedic content often has a strong resonance on social media, and it is easier to be shared and spread. Its entertainment attributes are also in line with TikTok's relaxed and fun community atmosphere.</p>		
#3dprinting	400 million views	2		<p><b>#gamedev</b></p> <p>Displaying all kinds of creativity and professional technology in the process of game development provides a more in-depth understanding of the game, showcasing technical capabilities, and attracting audiences interested in the game and scientific and technological content.</p>	
#puzzle	377 million views	3			<p><b>#match3</b></p> <p>As a casual gameplay, match-3 itself doesn't stand out in terms of views, but its recent player interest has shown an upward trend, implying that match-3 games are gradually gaining favor among more and more American players.</p>
#sewing	366 million views				
#comedysketch	172 million views				
#diycraft	139 million views				
#pulls (gacha pulls)	9 million views				
#zombiegame	9 million views				
#bestfiends	432 thousand views				
#match3	164 thousand views				

Note: Views statistics from August 2023 - November 2023.

Look for focal points based on eye catching hashtags!

Hashtag	#cosplay (role-playing) #diycrafts	Hashtag	#comedysketch #couples
Performance data	Views 47.2k Likes 2344	Performance data	Views 2M Likes 15.7k
Video content	A creator displays the entire process of crafting weapons for game characters. These complicated technical details in the video enhance the overall viewing experience, as well create a stronger interest in the game's characters.	Video content	In a simulated life scene, a wife's addiction to a game late at night causes her husband to be suspicious. The wife then introduces the interesting features of the game, such as how it's fun, free, etc. A week later, the husband also falls in love with the game and outranks his wife, much to her chagrin.
Creative analysis	<ul style="list-style-type: none"> <li>The challenge is set at the beginning of the video—duplicating the character's weapon, which piques the audience's curiosity to see the final result.</li> <li>Showing multiple complicated processes and revealing the intention of the video's creator makes audiences more likely to finish watching the video.</li> <li>Once complete, the weapon is compared with its appearance in the game to draw audiences' attention back to the game.</li> </ul>	Creative analysis	<ul style="list-style-type: none"> <li>Lifelike scenes and husband and wife characters make the video's content more intimate.</li> <li>The story's reversal entertains audiences while deepening their impression of the game, and the competitive element of the story also resonates with players.</li> </ul>
Case study		Case study	

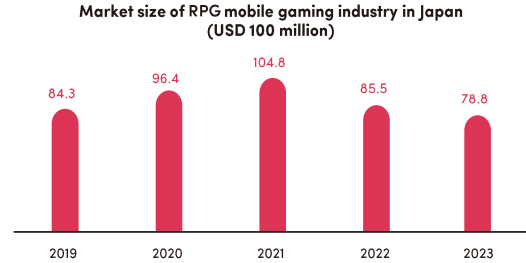
Data source: TikTok Creative Center, AppGrowing

## 3.3 Japanese market insights

### Market challenges

The size of the mobile RPG game market in Japan is relatively large, but is showing signs of a decline.

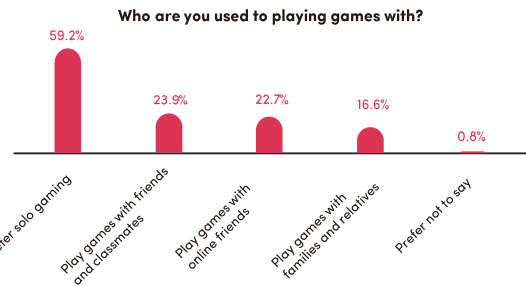
- The market size is large, ranking Top 1 among global markets, but has declined in recent years:  
The reason is that in the Japanese market, the RPG category emerged much earlier, has already witnessed high-speed growth, and is experiencing a decline at this stage.



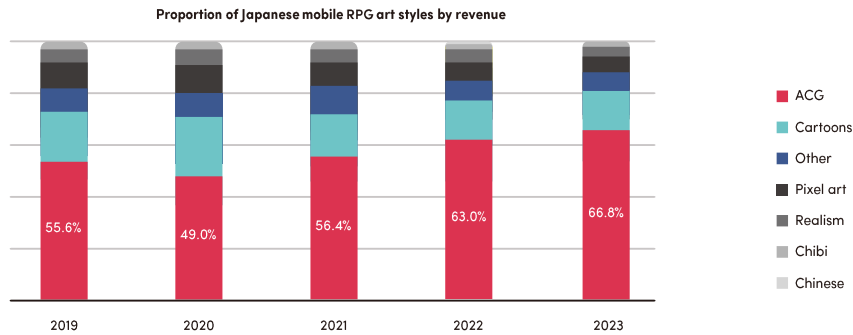
- It is difficult for new games to expand the market:  
Japanese players have a high degree of loyalty and a preference for familiar gameplay, and their single-product retention time is higher than that of other regions. Japanese players playing for more than 5 years account for the highest proportion in the world. Old games have a solid follower base, making it difficult for new games to open up the market.

Players have a low preference for social interaction:

- Japanese players prefer solo gaming:  
Solo gaming can help reduce the stress of social interactions. Japanese society emphasizes the importance of "not causing trouble to others", but the social genre of RPGs is usually associated with more complex interpersonal relationships and the need to accept the negative feelings of other players. Therefore, players who turn to games for entertainment and relaxation tend to exhibit a stronger inclination toward choosing solo games.



Higher expectations for the game's art style:

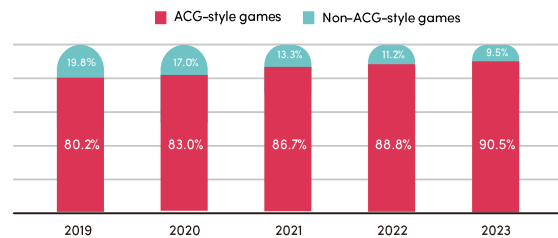


- Fierce competition among art styles:  
As the main producer of ACG culture, players generally prefer art portraits in the ACG style. Because of the sophisticated animation production techniques, it is difficult for latecomers to stand out from the competition by using conventional art styles. Therefore, in the Japanese market, it is more important to compete in details such as artwork, to meet the demands of players by continuously improving the quality and innovation of game art. However high-quality artwork will have higher requirements for capital, talent and experience.

Preference is given to ACG, but the competition is fierce.

- ACG-style games boast a higher market share:  
The Japanese ACG-style game market stands out with its high market share, in-depth player recognition, and sophisticated game requirements, and it is relatively difficult for new entrants to compete.

Changes in the proportion of ACG-style RPGs in Japanese mobile games by revenue



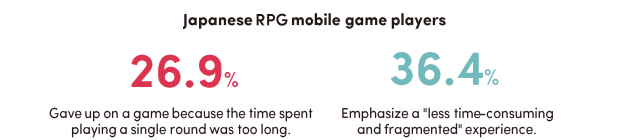
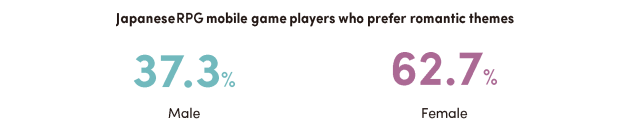
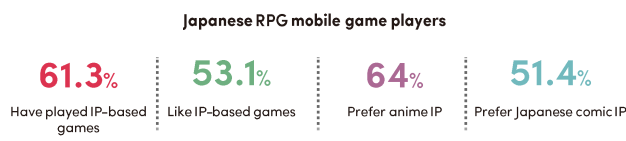
Data source: Gamma Data (CNG)

Japan

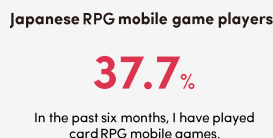
## Market opportunities

### The game's point of interest:

- Leveraging IP collaboration and Japanese comic IP:**  
 Japanese players prefer IP, thus leveraging an IP collaboration is worth consideration, such as collaborating with a local ACG IP to effectively highlight character traits.
- Romance-themed RPGs may present potential opportunities:**  
 31.4% of Japanese players are interested in romantic themes, with women showing a more significant preference for romantic themes. However, no popular RPG with romantic themes has been released yet, which presents a significant potential opportunity.
- Casual RPGs and idle RPGs may pose new opportunities:**  
 A "fragmented experience" is preferred by Japanese players and can also play an important role in retention. Casual RPGs and idle RPGs are categories that combine a "fragmented" experience with less play time. Therefore, they may present more opportunities.

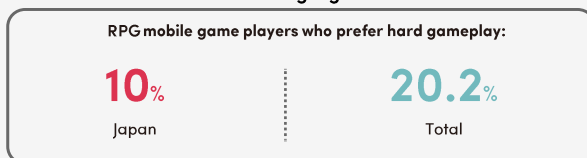


**The card RPG category enjoys the strongest preference among users:** Among existing Japanese mobile RPG players, card RPGs account for a higher percentage of users' preference than other categories, mainly due to easy gameplay, unpredictable gacha pulls, and the fun of cultivation in card RPGs.



**Players pay to unlock more characters:** The card RPG genre tends to adopt multiple character draws as the core of its gameplay, and Japanese RPG players have a high preference for collecting visually appealing and diverse characters. When it comes to payments, unlocking characters (45.5%) is the most popular option for payment among Japanese RPG players, far higher than the second-ranked payment option, which was leveling up in-game statistics (21.1%).

### Japanese RPG players care more about easy gameplay when choosing a game.



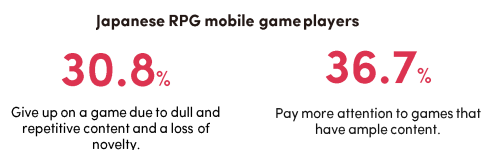
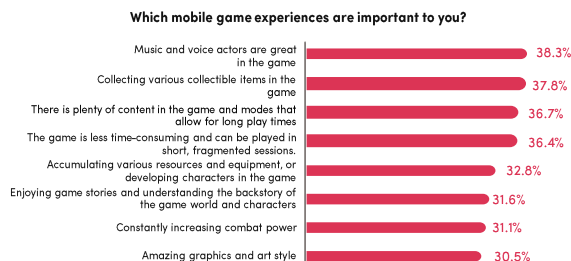
### Which of the following factors make you want to pay in mobile games (TOP 3)?



Tips: Based on opportunities that card RPGs have in Japan, the following will analyze how this category can utilize TikTok to further improve user acquisition.

### Points of interest on non-gaming platforms:

- Japanese RPG players have a stronger preference for story-driven content:**  
 For Japanese gamers, rich game content, higher-quality music and voice actors, and a well-developed story are the most important aspects of their gaming experiences.
- Insufficient content can easily lead to a higher churn rate:**  
 30.8% of Japanese RPG players will abandon a game because of repetitive and boring content, which means that a sustainable supply of content is important for a game to have long-term value.



## Market opportunities

Aside from higher requirements in terms of their gaming experience, **Japanese RPG players also show a growing interest in non-gaming platforms:**

- **25.1%** of players think that non-gaming platforms can offer exciting experiences compared with last year.
- **29.8%** of players consider non-gaming platforms to be more important compared with last year.
- **45.1%** of players perceive non-gaming platforms as helpful in finding game walkthroughs.

**In addition to enhancing the game's content, it is also necessary to provide more content on non-gaming platforms:** Aside from developing high-quality artwork, BGM, storylines, characters and other elements in the game, enterprises can also offer additional content on non-gaming platforms to create a deeper resonance with players and their experiences, **reach a wider range of players through the provision of content on non-gaming platforms, and attract more players to play the game.**

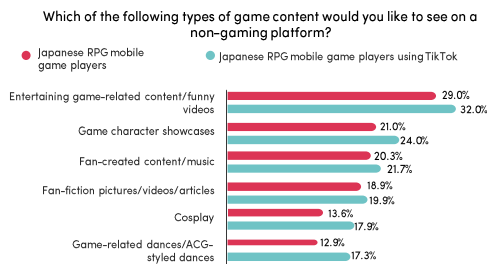
### Reach players through diverse content available on TikTok.

- **TikTok has rich RPG gaming content:**

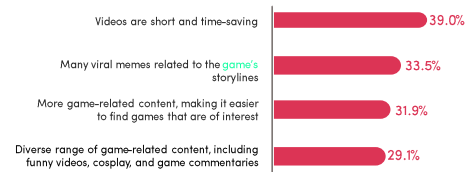
TikTok has rich ACG content, character information, creator creatives, and character cosplaying, and expanded content on TikTok can better meet the needs of players. Japanese RPG players use TikTok to obtain information mainly because TikTok videos are short, contain viral memes, and have rich cosplay content. Disseminating content on TikTok can attract the attention of more players.

- **TikTok users' strong demand for content consumption and creativeness contribute to the promotion of games:**

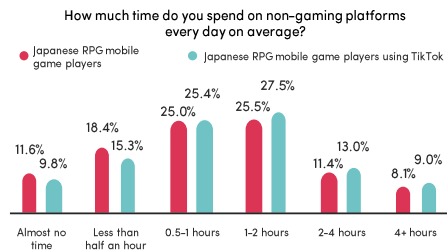
**TikTok users pay more attention to content:** Japanese RPG players who use TikTok pay more attention to various game content, especially interesting and fun content, character showcases, fan-created content, fan-fiction videos, etc.



### Why do you like to get game-related content through TikTok?



**TikTok users spend more time watching content:** Japanese RPG players who use TikTok spend more time on non-gaming platforms, consume more hours of content, and find the content more appealing.



**TikTok players have a stronger desire to create and share content:** 19.4% of Japanese RPG players who use TikTok will record and share game content, a figure which is 4% higher than overall Japanese RPG players.

### By collaborating with creators on TikTok, we can enhance the effect of characters and provide more content.

- **Increase fan-created content:**

Japanese RPG players pay a lot of attention to fan-created content, fan-created music, fan-fiction videos, etc. When providing non-gaming content, companies can increase the creation of fan-created works, develop a fan-fiction content creation plan, cooperate with highly creative creators, and combine the game with creators to feature interesting content when releasing a new version or launching a new character.

- **Expand the impact of a character:**

Character birthdays and anniversaries can be included as important events to expand the impact of the character on TikTok. In addition to fan-created content, companies can also invite real people related to the character, including stars, voice actors, and artists, to produce content and expand the influence of such content.

- **Expand the world view and artistic elements:**

Japanese RPG players download games because of the game's worldview (40.3%), character and character persona (36.6%), and art style (25.3%). TikTok can create more stories related to the game's worldview in cooperation with creators and can also present exquisite portraits and artwork through creators to attract users' attention.



A creator draws a picture to celebrate the character's birthday and showcases the drawing process.

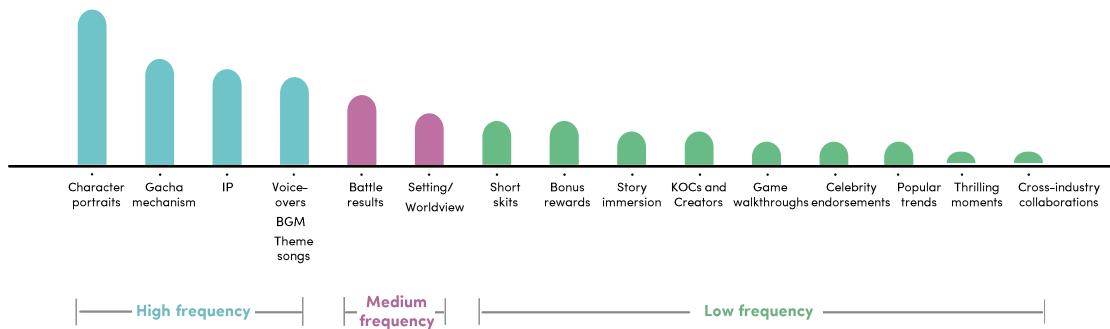
Japan

## Japanese card RPGs: Combine character portraits with BGM to attract target audiences on TikTok.



Which creative elements on TikTok can be combined to achieve better results?

### Selling points of performance ads creatives of top games on TikTok\*



### Combination of creative selling points:

Creative combinations	Creative content	Target audience
1 Character portraits + Theme song	The theme music of the game is used as the video's BGM, and the synchronized carousel shows the portraits of multiple game characters or scenes from matches.	The theme music of the game is often more memorable, and is displayed together with portraits, which helps attract players who value the audio-visual experience.
2 ACG IP + Story immersion	Based on the original ACG IP content, this format replicates popular characters and classic scenes to arouse followers' interests, and then gradually transitions to the game screen.	Mainly appeals to a follower base with an emotional attachment to the original work. The higher the recognition of the original IPs, the more effective the exposure becomes.
3 Worldview + Voice-over/BGM	The unique rules of the other world are told through a large number of long-range shots and overhead perspectives, coupled with a grand voice-over.	Stimulates the imagination of players and provides a stronger appeal to players who like exploratory and adventurous elements.
4 Game walkthrough + Gacha mechanism	Analyzing and interpreting strong characters that require being drawn makes players more excited to obtain in-game characters, while emphasizing the benefits of free gacha pulls to stimulate downloads.	Players who seek rapid growth and the thrill of clearing missions are more likely to be attracted and motivated by free gacha pulls.

### Case study of creatives:

#### Character portraits + Theme music

CTR Top: 8%

#### Worldview + BGM

CTR Top: 11%

Opening	Middle	Ending	Opening	Middle	Ending
Portraits of fixed characters are displayed at the bottom of the screen, and in-game scenes are displayed at the top of the screen, suggesting that the worldview setting of the game is on a campus.	Passionate theme music is used as the BGM, and the screen is interwoven with combat-related special effects and voice-overs to create a frenzied atmosphere.	The protagonist defeats the boss, leaving a handsome figure, and pushing the overall mood to its climax.	Distant shots show the fantastical game world, and a piece of symphonic music is used as the BGM, highlighting the sense of adventure.	From the rear perspective, audiences can see game characters in different scenes and experience a unique sense of immersion.	The game's logo and download CTA are displayed, using a splicing of various game scenes as the background to reflect the rich content of the game world.

\*Selling points of creatives of top games on TikTok in the past year, excluding organic content.

## Hot TikTok hashtags in Japan that can be incorporated with card RPGs:

What hot content on TikTok can be used as creatives?

Search for creative inspiration from the following hot hashtags!

Hashtag	Views
#ワンピース (One Piece)	2 billion views
#コスプレ (cosplay)	843 million views
#ゲーム実況 (game live)	813 million views
#ポケモン (pokémon)	535 million views
#jfk (ujutsukaisen)	396 million views
#ガチャ (Gacha)	220 million views
#ウマ娘 (Pretty Derby)	66 million views
#神引き (Godly gacha)	61 million views
#七つの大罪 (The Seven Deadly Sins)	36 million views
#ゲーム紹介 (Game introduction)	30 million views

1 Potential hashtags

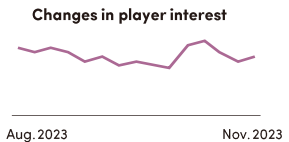
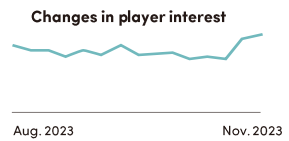
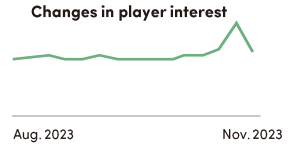
**#コスプレ (cosplay)**  
By cosplaying game characters, players can express their love for their favorite characters, showcase their talent and creativity, and experience a unique journey of breaking through the barriers between reality and the virtual world.

2 Potential hashtags

**#手描き (hand drawing)**  
Japan has a strong ACG culture, and many players would like to express their affection for games by hand-drawing pictures and using music, filters, and special effects to enhance the expression and appeal of their works.

3 Potential hashtags

**#七つの大罪 (The Seven Deadly Sins)**  
Famous Japanese fantasy shonen manga, derived films, TV and game works based on original popular comics also attract the attention and affection of a large number of audiences, and trigger sustained discussions.



Note: Views statistics from August 2023 - November 2023.

### Look for focal points based on eye catching hashtags!

Hashtag	#七つの大罪 (The Seven Deadly Sins) #グラクロ (Grand Cross)	Hashtag	#ウマ娘 (Pretty Derby) #ウマ娘コスプレ (Pretty Derby cosplay)
Performance data	Views: 35.9k Likes: 1401	Performance data	Views: 36.2k Likes: 1671
Video content	The content is presented in the form of a character development tutorial, which gradually explains how to rapidly increase the character's combat power from less than 50,000 to more than 100,000 through the adjustment of equipment, clothing, relics, and leveling up, and breaks down characteristics of various characters and features of equipment during the process.	Video content	A cosplay lip-sync video begins with the creator revealing their appearance without make-up in the first half, intentionally distorting their image with humorous filters. In the second half of the video, the creator completes the cosplay transformation and continues singing with exquisite makeup and hair styling.
Creative analysis	<ul style="list-style-type: none"> <li>Using the game's name and the names of popular characters from the IP as hashtags quickly attracts existing players as a foundation for the game's popularity.</li> <li>The whole process uses in-game screens, with a sped-up human voice-over, keeping production costs low and creating a more intuitive delivery of the content.</li> <li>At the end of each step, the combat power interface presents a comparison of the character's combat power before and after the battle to reinforce the audiences' impression.</li> </ul>	Creative analysis	<ul style="list-style-type: none"> <li>The contrast before and after makeup creates a powerful visual impact. In the first half, a funny filter is used to pique the curiosity of audience, preventing audiences from skipping the video in the first 3 seconds.</li> <li>The self-deprecating approach of deliberately portraying one's image as unattractive is more successful in winning over audiences and eliciting positive comments on social media.</li> </ul>
Case study		Case study	

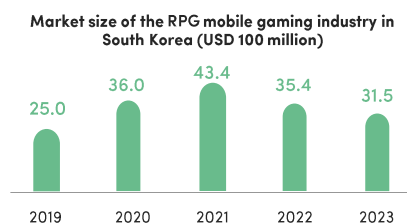
Data source: TikTok Creative Center, AppGrowing

## 3.4 Insight into the South Korean market

### “ Market challenges

The size of the mobile RPG game market in South Korea is relatively large, but has experienced a significant decline.

- Among the various regions in this survey, **South Korea's mobile RPG game market is relatively large**. However, in recent years, South Korea's market size has shown a declining trend. Part of the reason is that MMORPGs, as the main category, offer an ossified gaming experience. Namely, existing flagship products have similar gameplay, resulting in a high degree of ossification. Moreover, they require a significant amount of time and monetary investment from players, resulting in high payment expectations and subsequent player churn.



The proportion of RPGs in terms of revenue and volume continues to decline, mainly due to product ossification.

Although the market position occupied by **South Korean RPGs in the games market is still at a relatively high level, there is a significant downward trend**. This is mainly because old IP games have taken a dominant position at this stage, and they account for roughly 60% of the RPG market share, resulting in fewer new and innovative products.

- South Korea's old IP games are mainly based on PC games. With over ten years of development, they have lost their appeal to younger players, further leading to the ossification of South Korea's RPG products. As a result, it is difficult to find room for growth in the market. At present, the IP revenue of South Korea's top mobile RPGs account for 76.5% of client-side games, much higher than that in other regions.



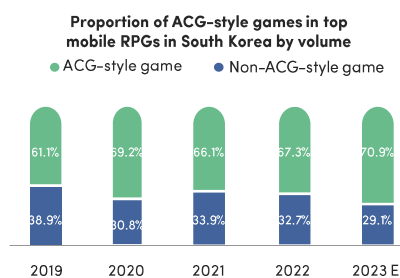
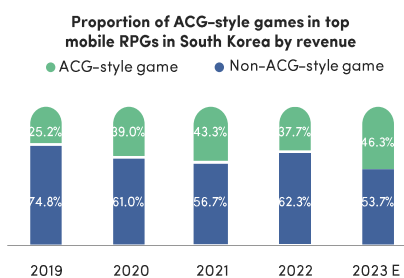
Players place higher demands on the in-game battle system.

**Increasing combat power and developing characters are the core pleasures pursued by players in South Korea**. The settings for battle systems are often more complicated; if the process of upgrading combat skills is too easy, players will feel bored due to the lack of any sense of accomplishment. However, if the upgrading process is too difficult, it will result in players feeling frustrated. In addition, if the payment system's design is poorly developed, it will directly impact the cost-effectiveness of paid content. This can create an impression of excessive payment requirements and financial pressure on players, and impact the balanced ecosystem of minnows, dolphins and whales, disrupting the overall equilibrium of the game and ultimately leading to more players abandoning the game. For games entering the South Korean market, combat and skill systems need to be more refined.

- 29.9%** of players are more interested in "increasing combat power (e.g., combat power ratings and damage statistics)" and focus on increasing combat power statistics.
- 31.3%** of players tend to give up on a game because of "too many paid items in the game or unreasonable pricing" and highly value cost effectiveness.
- 31.0%** of players attach great significance to the experience of "accumulating various resources and equipment, or developing characters in games", focusing on the improvement of development statistics.

The proportion of ACG-style games has been declining for many years.

- ACG-style games in South Korea attract the attention of roughly 60% of players, but it should be noted that the proportion of South Korea's top ACG games in terms of revenue and volume has declined for several years. New ACG games that want to enter the South Korean market may face an unfavorable situation.



Data source: Gamma Data (CNG)



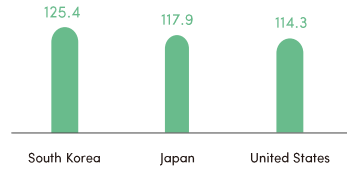
## Market opportunities

### The game's point of interest

The average spending level of RPG players ranks highest.

The per capita spending level of South Korean RPG players ranks at the top of the list, with an equivalent spending of over USD 125 per month. Strong purchasing power and willingness to spend also indicate the high commercialization potential of products and require focusing on the design of the game's payment system.

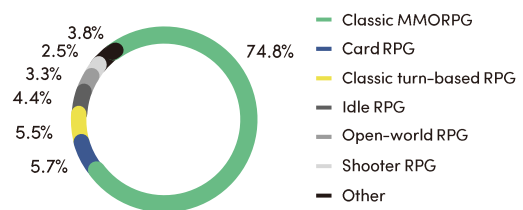
Average monthly spending on mobile games in the past year (USD)



Classic ARPGs and shooter RPGs still have opportunities.

The revenue of classic MMORPGs account for a higher proportion of the South Korean market, but other categories also pose opportunities. In terms of revenue, shooter RPGs and ARPGs may have less revenue overall, but their user preference is high. Therefore, they are expected to obtain more market share in the future. According to the survey data, 37.9% of RPG players in South Korea have played a classic ARPG in the past six months, and 35.8% have played a shooter RPG.

Proportion of top mobile RPG gameplays by revenue in South Korea in 2023



Shooter RPGs can be blended with other gameplays.

More than half of RPG players in South Korea have played shooter games in the past six months, and genre-blending by incorporating elements of shooter gameplay aligns well with RPG games and can attract RPG players in South Korea. In particular, shooter games align with players' gaming habits and evoke a strong sense of competition.

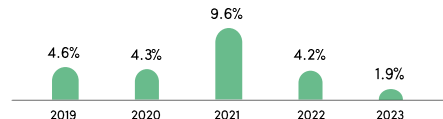
ARPGs present more opportunities.

In terms of market performance, the classic ARPG was once hot in South Korea, but its popularity was not sustainable, mainly due to the game's life cycle. Typical products failed to maintain long-term operations, resulting in a rapid decline in revenue. However, judging from past data, the sense of combat and excitement offered by ARPGs is still favored by players, and there are still some opportunities for this type of gameplay in the South Korean market.

Other types of games played by RPG players in the past six months

**TOP 1**  
**Shooters (51.9%)**

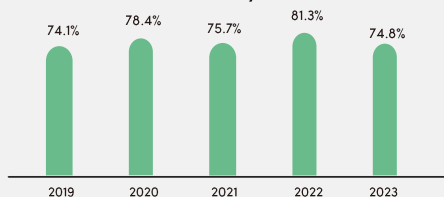
Changes in revenue of classic ARPGs in top RPG mobile games in South Korea



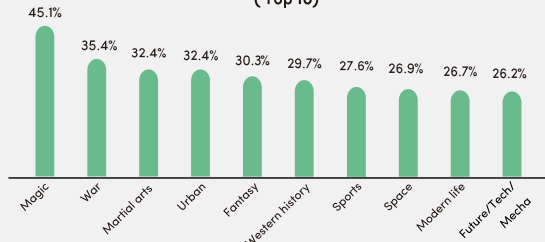
Magic MMORPGs pose a key opportunity, and war, martial arts, and urban-style themes have growth potential.

- According to various data, in the South Korean market, the classic MMORPG genre occupies unparalleled advantages and is a good choice to enter the market. However, the competition is also extremely fierce, and the category faces a challenge, namely that "players are easy to give up on the game due to gameplay ossification and payment pressure". At this stage, companies can find a breakthrough by leveraging players' stronger preference for themes, art style, innovative gameplay, etc.
- The magic MMORPG genre enjoys greater popularity in South Korea, characterized by high-quality artwork, 3D modeling, and sword and magic themes. In the South Korean market, both player preference and revenue performance of magic MMORPGs rank Top 1, and the share of this category in terms of overall volume has remained at 40% in recent years. This theme can also be integrated with a realistic art style, which represents the highest user preference in South Korea (52.1%).
- Optimizing payment-related settings is also an important step. For example, try entering the market by introducing magical themes familiar to players while integrating idle elements to reduce time consumption and monetary expenditure. Maintaining relatively restrained payment points and ensuring fair competition while upholding the completeness of statistical systems can help retain players and transition them into long-term players.

Proportion of classic MMORPGs in top mobile RPGs in South Korea by revenue



What kind of cultural themes do you prefer in games? (Top 10)



Tips: Based on the opportunities that magic-themed MMORPGs present in South Korea, the following will focus on how this category can utilize TikTok to further improve user acquisition.

South Korea

Market opportunities

Points of interest on non-gaming platforms

Korean RPG players have a high demand for livestreaming, so we can leverage game livestreaming to reach audiences.

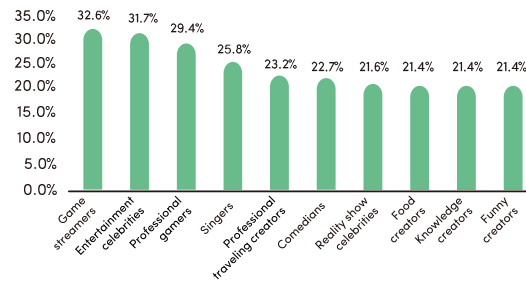
- E-sports live broadcasts garner significant attention: Thanks to a strong E-sports culture, players in South Korea are particularly drawn to E-sports content, which uses live broadcasts to connect core aspects of E-sports, including users, players, commentators, events, peripheral equipment and so on. Focusing on the development of live broadcasts allows the game to attract and retain more players, making players more likely to return and make purchases by leveraging the popularity of E-sports.

RPG mobile game players in South Korea

77.5% Browse/participate in E-sports related content almost every day  
81.8% Watch game livestreams almost every day

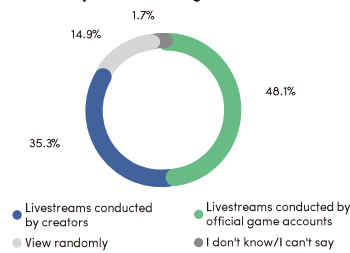
- Game streamers and players command significant attention: When organizing livestreams, companies should focus on cooperating with creators, such as players and game commentators, and developing livestreamers with their own unique styles (i.e., funny, knowledgeable, etc.) to enhance the livestream's effect.

What types of celebrities or creators do you usually follow?



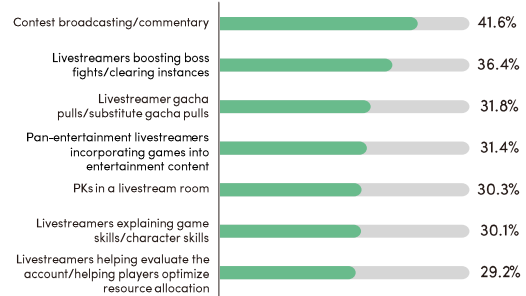
- Pay attention to creator and official account livestreams: These livestreams garner significant attention, and players can be guided to follow the official account of the game while watching a creator's livestream, thus further amplifying the influence of the game.

What types of livestreaming channels do you usually use to watch game livestreams?



- Highlighting E-sports-related content: During livestreams, companies can spotlight key elements such as the broadcasting and commentary of competitive events, livestreamers taking on bosses and instances, and other hardcore gaming content. Companies can also integrate game content with entertainment-related content by collaborating with pan-entertainment livestreamers.

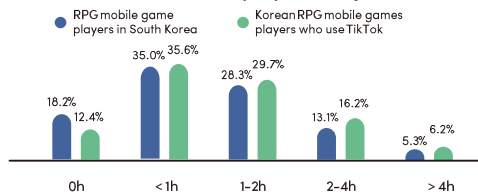
When you watch the livestreams of games, which of the following content do you prefer?



Korean RPG players who use TikTok have a stronger preference for watching livestreams, and a variety of content can be tried out on TikTok.

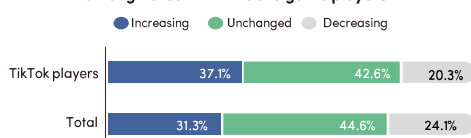
- Korean RPG players who use TikTok watch livestreams for a longer duration:

How much time do you spend on a game's livestream every day on average?



- Korean RPG players who use TikTok have seen a significant increase in viewing hours of livestreams in recent years.

Changes in viewing hours of game livestreams among Korean RPG mobile game players



Empower livestreams through diverse creators:

Experienced livestreamers

Streamers with rich experience can expertly navigate livestreams and cover a wide range of content.

High-end gamer showcase

Dynamic and engaging live streams

Professional strategies and tips

Experienced and skilled players who provide professional commentary on game content and share useful game tips.

Professional game commentary

In-depth gameplay suggestions

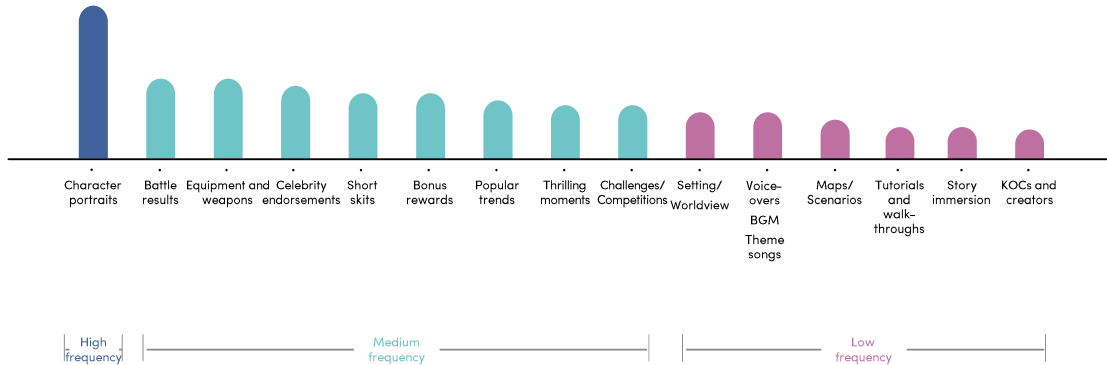
Data source: Gamma Data (CNG)

## “ Magic-themed MMORPGs: Work with celebrities and creators on TikTok to expand magical and competitive elements. South Korea



Which creative elements on TikTok can be combined to achieve better results?

### Selling points of performance ads creatives of top games on TikTok\*



### Combination of creative selling points:

Creative combinations	Creative content	Target audience
1 Celebrity endorsements + Setting/worldview + Bonus rewards	Local celebrities are invited as game endorsers, having them dress up as characters from the game, to share information about new releases, events, and characters. Finally, the endorser calls on the audience to experience the game together and offer enticing download rewards.	Utilizing the popularity of local celebrities attracts audiences to remain in the livestream. Then appeal to players by listing the selling points of the game and incentivize them to take action with download rewards.
2 Character portraits + Equipment and weapons	The creative enhances the game character creation interface, displaying the appearance, weapons and skill features of characters by class and race, such as Warrior, Knight, Archer and Wizard, based on a magical theme.	Players who like custom development or tactical strategy combinations are more likely to be attracted by this kind of advertisement.
3 Character portraits + Challenge/Competition + Popular trends	Using high-precision CG videos to showcase the process of game characters challenging the boss highlights the fluid attack animations and the rich skill effects of characters. At the same time, a voice-over reminds players that the game is developed based on the latest technology, and only the latest mobile phone models support the highest configuration, so as to cater to the mindset of Korean players in chasing the hottest trends.	On the one hand, this can identify players who use a certain mobile phone model and pique their interest; on the other hand, it can also appeal to technology enthusiasts who pursue high-quality graphics and premium gaming experiences.

### Case study of creatives:

**Celebrity endorsements + Battle results + Bonus rewards** CTR Top: 10%

Opening	Middle	Ending
The celebrity endorser portrays a sense of urgency, encouraging audiences to stay on the screen with them, thereby piquing their curiosity.	The celebrity announces the release of the game, introducing basic information, and highlighting the game's 'Dark Oriental Fantasy' theme.	Lucrative rewards are displayed for a time-limited event, emphasizing the value of the rewards, and calling on audiences to join the event immediately.

**Character portraits + Weapons and equipment** CTR Top: 13%

Opening	Middle	Ending
At the outset, the clip makes it clear that this is the newest RPG game from 2023, and encourages audiences to join in the experience, fostering a sense of connection.	Exquisite CG animation is used to show the characteristics of the game's portrait modeling, appearances, and weapons and equipment of different characters by class.	Switching to in-game scenes showcases the game's combat action, skill characteristics and high-quality special effects exclusive to each class.

\*Selling points of creatives of top games on TikTok in the past year, excluding organic content.

# Hot TikTok themes can be incorporated with magic-themed MMORPGs.

## South Korea

What hot content on TikTok can be used as creatives?

Search for creative inspiration from the following hot hashtags!

Hashtag	Views
#코미디 (Comedy)	569 million views
#춤 (Dance)	189 million views
#크리스마스 (Christmas)	112 million views
#리방 (livestream)	39 million views
#할로윈 (Halloween)	31 million views
#OST (original soundtrack)	28 million views
#판타지 (fantasy)	5 million views
#광전사키우기 (Raising a Light Warrior)	3 million views
#코스튬 (clothing)	2 million views
#리니지 (heaven)	1 million views

**1 Potential hashtags**

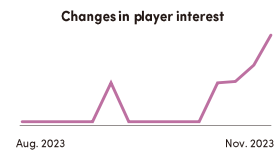
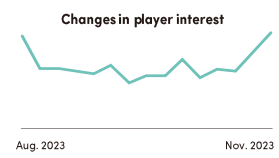
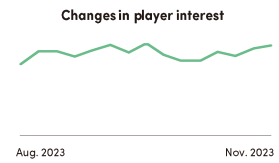
**#OST (original soundtrack)**  
OST refers to the background music or theme song of a film or game. South Korea has a flourishing cultural industry with outstanding musical talents. Integrating high-quality music can elevate the game's brand image.

**2 Potential hashtags**

**# 다크판타지 (Dark Fantasy)**  
Different from traditional fantasy styles that often focus on elements such as light, morality, and human brilliance, dark fantasy delves into themes of darkness, blood, and the darker aspects of life. This unique approach provides players with a fresh psychological impact and stimulation, capturing their attention.

**3 Potential hashtags**

**# 글로벌대세 (global trend)**  
This topic is usually used to describe products that have gained international recognition and influence in various fields. Korean players like to chase trends, so highlighting the game's popularity within trending topics can easily win the favor of Korean players.



Note: Views statistics from August 2023 - November 2023.

Look for focal points based on eye catching hashtags!

**Hashtag**: #Lineage2M #Lineage #리니지 (heaven)

**Performance data**: Views 253.8k Likes 11.1k

**Video content**: A TikTok famous singer is invited to cover the theme song of Lineage 2M; the video captures a 30-second clip of the singer's high-pitched vocal performance, showcasing the singer's outstanding vocal skills.

**Creative analysis**

- High-pitched vocal parts quickly create an exciting and moving atmosphere, which helps to establish an emotional connection between the brand and audience.
- The video only shows a clip of the song being covered, omitting the game's content, which piques the audience's curiosity and interest in the game.

**Case study**

**Hashtag**: #광전사키우기 (Raising a Light Warrior)

**Performance data**: Views 454.1k Likes 7862

**Video content**: In a short skit where one person takes on multiple characters, a creator plays, in the other gender, a female character who yearns for a boyfriend. She finds herself surrounded by muscular and sensual Berserkers in the game, and develops a passion for the game as a result.

**Creative analysis**

- The contrasting performance of a man dressing as a woman adds an element of humor and makes the video more interesting, thus garnering more attention.
- In the second half of the video, the Berserker character is used to introduce scenes from the game and other content, displaying game features and emphasizing the selling points of the character through the creator's dramatic performance.

**Case study**

Data source: TikTok Creative Center, AppGrowing

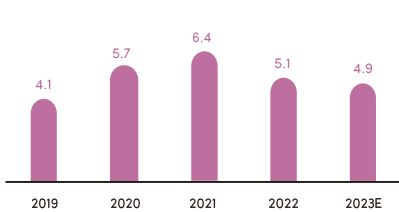
## 3.5 Southeast Asia market insights

### Market challenges

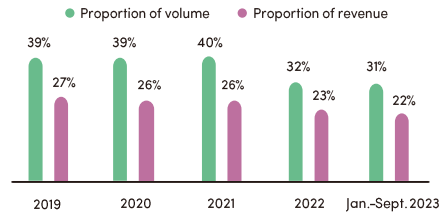
Competition from other genres has led to a slight decline in the performance of RPGs.

- Due to low income levels, the RPG market in Southeast Asia is relatively small. At present, the RPG market ranks first in Southeast Asia, but by a small margin, and its market share is gradually declining. The RPG market share is being further squeezed to some extent by the sustainable development of categories such as strategy (17.5%), MOBA (14.8%), and shooter (10.7%) games.

Market size of the RPG mobile gaming industry in Southeast Asia (USD 100 million)



Proportion of RPGs in the Top 100 mobile games in Southeast Asia



Complex technical conditions such as gaming equipment, network environments and packages pose challenges.

#### Complex gaming equipment:

When entering the Southeast Asia market, it's crucial to thoroughly understand the gaming device preferences of players. The proportion of Android players in Southeast Asia is higher (70.6%), and the mixed use of devices is likely to cause bugs and affect the normal functioning of game software, which can contribute to player churn in the region.

#### Significant differences in network environments:

The network conditions and network speeds in Southeast Asia vary among countries. The network signal in some areas is poor, which affects the game's experience.

#### Game packages need optimization:

Considering the load capacity of devices and networks, games with smaller installation packages dominate the Southeast Asia market, so the streamlining of product packages is particularly important.

#### Improved gaming experience:

Because of the market characteristics of Southeast Asia, developers should pay more attention to the basic performance of devices and adapt to device configurations by reducing the size of the game package and content. Data research shows that the gaming experience of RPG players in Southeast Asia is even better than that of some developed regions, and more than 80% of players have a stable game-playing experience.

Why did you give up playing a certain mobile game?

32.7%  
Too many bugs in the game

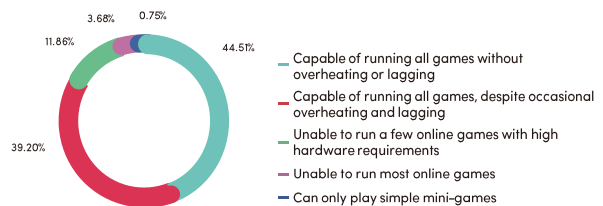
28.1%  
Hardware factors, such as insufficient mobile phone memory

What makes you want to keep playing a game?

31.2%

The mobile device can support uninterrupted gameplay

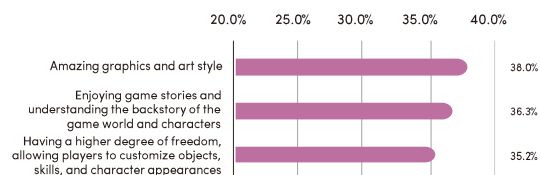
How does your mobile phone perform when playing games?



There is a conflict between the players' core needs and their device's specifications.

- Although games for Southeast Asia need to be streamlined, this conflicts with the need of RPG core players, and balancing the player experience with users' device specifications is a challenge for market entrants. It's crucial for developers to find a middle ground that satisfies players' demands for high-quality graphics, engaging story presentation, and the freedom to customize elements of the game, while ensuring compatibility with the devices prevalent in the region.

Which mobile game experiences are important to you?



Data source: Gamma Data (CNG)

Southeast Asia

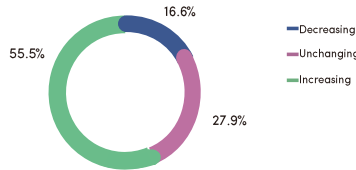
Market opportunities

The game's point of interest

Plenty of gaming time:

Southeast Asian players have relatively abundant time for gaming, and more than half of them have increased their gaming time in recent years.

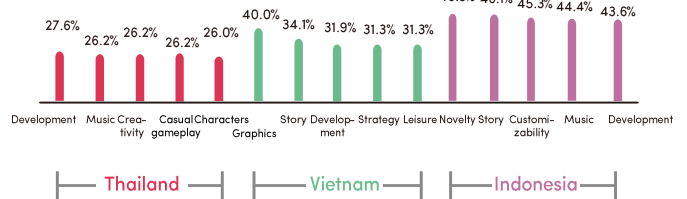
Changes in average time spent on games by RPG players



Differentiation strategies should be adjusted according to local conditions:

Southeast Asia as a whole is a complicated region, so it is necessary to pay attention to the differences among players. For example, players in Thailand, Vietnam and Indonesia display different preferences in terms of game elements. Thai players prefer music and casual elements, Vietnamese players prefer high-resolution games, while Indonesian players value fresh and novel elements.

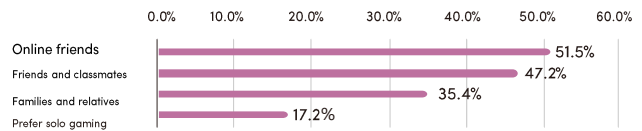
In terms of RPGs, which of the following game elements are you more interested in?



Create a gaming experience that brings players together:

Less than 20% of RPG gamers in Southeast Asia like to play games alone, with the majority of players opting to entertain themselves together with other players. This means that RPG games trying to enter the Southeast Asia market will have to emphasize elements such as multi-player entertainment and enhanced social experiences. MMORPGs that feature socialization as their core selling point will be more attractive in the Southeast Asian market.

Who are you used to playing games with?



MMORPGs fit the preferences of Southeast Asian players and can employ a variety of themes.

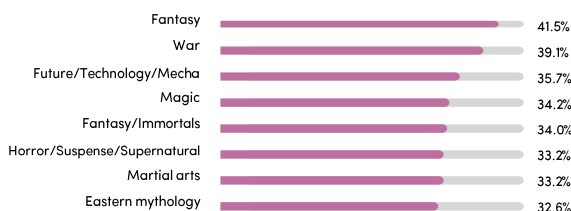
MMORPGs are the most popular: MMORPGs are currently the most popular gameplay among Southeast Asian players, with roughly 50% of players having played an MMORPG within the past six months. In terms of game elements preferred by Southeast Asian players, MMORPGs align well with the elements players care about most, such as an appealing art style (35.4%), storyline (34.4%), and high-quality music and sound effects (33.1%). Compared with ARPGs, open-world RPGs, and other categories that have higher requirements for network and device configurations, MMORPGs have lower requirements for devices and can be adapted to a wider range of Southeast Asian players.

Which types of RPGs have you played in the past six months? (TOP 5)

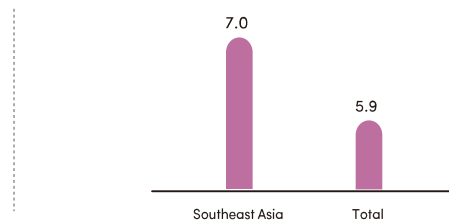


MMORPGs can employ multiple themes: Existing top games in Southeast Asia are mostly based around fantasy and magical themes, and players' preferences for fantasy/immortals, martial arts, oriental myths, and legends is also strong, mainly because Southeast Asia is strongly influenced by oriental cultures featuring fantastical and mythical realms. Moreover, players are more receptive to these themes, with an average of 7 cultural themes preferred by players in this region. Games trying to tap into this market can try blending diverse genres.

What kind of cultural themes do you prefer in games?



Average number of cultural themes preferred by RPG players



Tips: Based on the opportunities that MMORPGs present in Southeast Asia, the following will focus on how this category can utilize TikTok to further improve user acquisition.

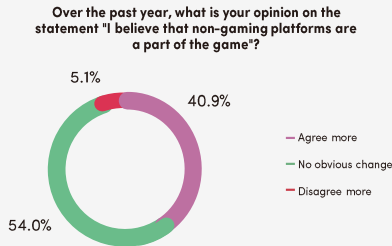
Data source: Gamma Data (CNG)

## Market opportunities

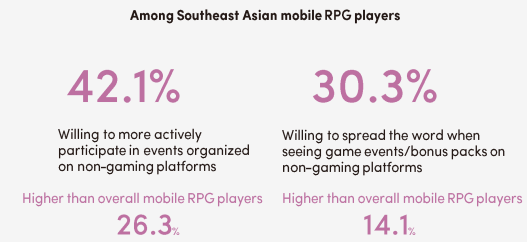
### Points of interest on non-gaming platforms

South East Asian RPG players have a strong demand for interaction and participation, so events on non-gaming platforms can be utilized to build momentum.

**South East Asian players value non-gaming platforms:** More players see non-gaming platforms as an extension of games. Therefore, organizing various events through non-gaming platforms is a good way to appeal to players.



**South East Asian players are more willing to participate in events:** In the Southeast Asian market, events can be used to reach more players in terms of both acquisition and long-term operations.



**High interest in interactive challenges:** When planning events, consider important events such as launches and updates. Focus on activities like interactive challenges or engagement with creators to attract players' interest.

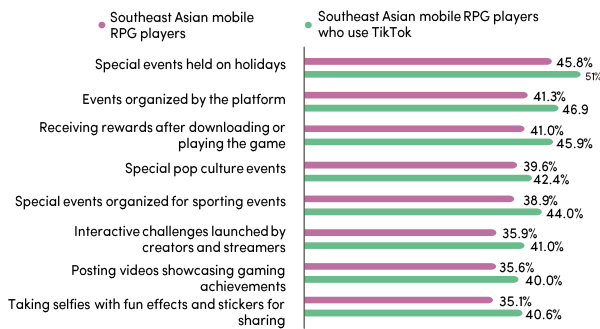


**High intent to use stickers and special effects:** When organizing events, offer players a wide range of effects and rewards such as stickers, special effects, BGM, etc.



South East Asian RPG players who use TikTok are more willing to participate in events, so companies can try hosting more localized events.

#### Which of the following events are you most interested in participating in?



- Utilize the interactive creativity of TikTok to inspire content:** Leverage gaming UGC incentive program to encourage more players to produce UGC interactive content and combine AR stickers and Capcut special effects to expand the content's influence, make characters more fun and dynamic, and enhance players' sense of immersion in the game.
- Use localized events to expand influence in groups:** TikTok has plenty of holidays and events that can be used for localized activities to promote more games, such as the Philippines' The Greatest Gamer E-sports competition, and the WCG (World Cyber Games) in the Philippines/Indonesia. In particular, The Greatest Gamer competition in the Philippines once generated 1.1 billion related video views in a single year, a total livestream PV of 2.26 million, and a total finals livestream UV of 57.5 thousand.



Online interactive marketing



Offline reality show for players



Placements throughout the tournament



Brand collaboration with tournament IPs



E-sports marketing for various projects

Brand sponsorships with lucrative prizes

Data source: Gamma Data (CNG), TikTok case study data compilation

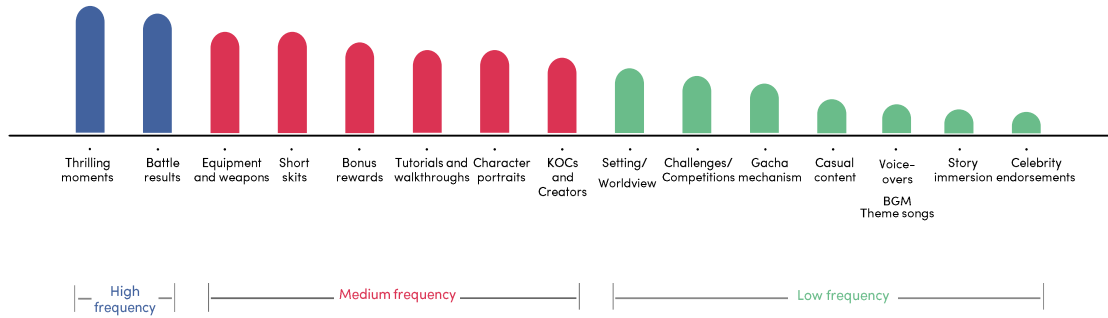
Southeast Asia

MMORPGs: Combine real people stories with character combat on TikTok to generate excitement and anticipation for competitions.



Which creative elements on TikTok can be combined to achieve better results?

Selling points of performance ads creatives of top games on TikTok\*



Combination of creative selling points:

Creative combinations	Creative content	Target audience
1 Weapons and equipment + Battle results + Thrilling moments	The main storyline is that of an ordinary warrior who obtains relics and equipment by chance. After acquiring relics, the combat power of the warrior surges and he begins hacking and slashing through minions and monsters. The video screen is filled with high damage stats and vibrant attack special effects, giving players an exhilarating visual spectacle and igniting their imagination of the gaming experience.	The target audience is mainly players who want to gain an advantage in battle through stronger equipment. The visual presentation of attack effects also entices players eager to experience the thrill of intense battles.
2 Short skits + Bonus rewards + Thrilling moments	As a few players compare combat power, the weaker player is humiliated and ostracized by the stronger players. Suddenly, there's a plot twist. It turns out the weak player has a hidden equipment/pet/character with exceptional combat power. Everyone is shocked, asking for the reason, and it turns out the game is currently offering free high-starred characters and lucrative upgrade resources.	The plot twist can catch players' attention and place them in the character's shoes, while the reveal of bonus resources appeals to those seeking rapid progression.
3 Creators + Tutorial and walkthrough + Bonus rewards	Game streamers or creators share tips with fans on how to clear instances, demonstrating the battle's process and valuable loot. At the end of the video, a call to action asks viewers to tap the exclusive link or use the redeem code to claim their bonus.	An instance walkthrough in the first half targets core players who enjoy competitions and challenges, while bonus content in the second half attracts the interest of new players and motivates them to join the game.

Case study of creatives:

Battle results + Thrilling moments

CTR Top: 20%

KOCs and creators + Tutorial and walkthrough + Bonus rewards

CTR Top: 19%

Battle results + Thrilling moments			KOCs and creators + Tutorial and walkthrough + Bonus rewards		
Opening	Middle	Ending	Opening	Middle	Ending
Shows the animations, weapons, and equipment of various characters from a third-person perspective that simulates the player's viewpoint to enhance the overall sense of immersion.	The character moves deftly through the game world, overcoming obstacles, and suddenly encounters a monster, setting the stage for battle.	Different characters cast their skills and the screen is filled with cool special effects. After a fierce battle, the characters prevail against the monsters.	The game streamer challenges a difficult boss instance and shares how to beat it in real time.	The streamer breaks down details about equipment and techniques, beating the boss, and how to earn lucrative rewards.	Reminds the audience that there is an ongoing event and displays the redeem code, physical prizes, and other bonuses.

\*Selling points of creatives of top games on TikTok in the past year, excluding organic content.

Data source: TikTok Creative Center, AppGrowing



## Hot TikTok hashtags in Southeast Asia can be incorporated with classic MMORPGs.

Southeast Asia

What hot content on TikTok can be used as creatives?

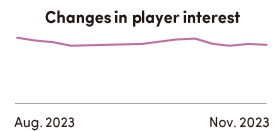
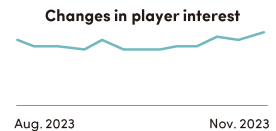
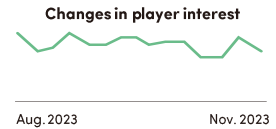
### Search for creative inspiration from the following hot hashtags!

Hashtag	Views
#funnymoments	3.618 billion views
#tokyorevengers	2 billion views
#ワンピース (one piece)	982 million views
#ผู้ชายติดเกม (man addicted to games)	366 million views
#vẽtranh (drawing pictures)	205 million views
#สามก๊ก (Three Kingdoms)	133 million views
#ไฮไลท์ (Highlights)	113 million views
#nostalgia	60 million views
#streetinterview	45 million views
#maplestory	10 million views

**#streetinterview**  
 Southeast Asia has diverse cultural and social backgrounds. Showing different views of players from different regions through interviews can pique the audience's interest and encourage participation.

**#ไฮไลท์ (highlights)**  
 The hashtag is typically used to share creative or skilled video content, such as exciting maneuvers or thrilling clips from the game. Sharing exciting clips of the game under the hashtag can help get viewers interested in trying the game.

**#ผู้ชายติดเกม (man addicted to games)**  
 Gaming creators often use this hashtag as a form of self-deprecating humor, expressing their love and obsession for a certain game, or showcasing funny moves or an epic gaming experience in a humorous way.



Note: Views statistics from August 2023 – November 2023 are the sum of views in Thailand, Vietnam, and Indonesia.

### Examples of creative TikTok content based on hot hashtags!

Hashtag	#DuetCungNuThan (duet with goddess)
Performance data	Views 372.6k Likes 26.9k
Video content	A famous Vietnamese TikTok creator joins the game's dance challenge, dancing to music from the game dressed as a cute kitty maid. At the end of the video, the creator emphasizes the launch of the game, and the game's logo appears on the screen.
Creative analysis	<ul style="list-style-type: none"> <li>The creator's image is in line with the game's "goddess" theme, making it highly appealing to viewers.</li> <li>The dance challenge, paired with high-quality costumes, ensures the content's quality, motivating viewers to keep watching.</li> <li>A short voiceover is added at the end to ensure the game's key message is conveyed.</li> </ul>
Case study	

Hashtag	#ทำเป็นนาง cosplay (cosplay challenge)
Performance data	Views 794.2k Likes 50.5k
Video content	A Thai creator joins the challenge and cosplays as a female character from the game. The first half of the video highlights the contrast between the cosplayer's modern and classical styles before and after the transformation, and the second half shows the character's portrait and in-game modeling.
Creative analysis	<ul style="list-style-type: none"> <li>This creator often posts cosplays of video game characters and has attracted a sizable following from local gamers, establishing a highly vertical fanbase.</li> <li>In this video, the creator cosplays as a beautiful female character, which is more attractive to male gamers, while the addition of gaming footage in the second half of the video turns viewers' attention from the creator to the game.</li> </ul>
Case study	

Data source: TikTok Creative Center, AppGrowing

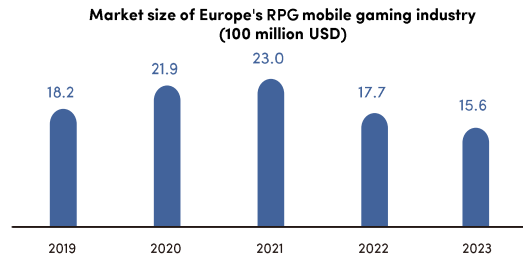
## 3.6 European market insights

### Market challenges and opportunities

The market size is declining rapidly, with fierce competition from other consoles.

**Fierce competition from games on other gaming devices:**

Europe's mobile game market continues to grow, but the market share of RPGs has declined. This is mainly because core highlights of RPGs, such as the worldview, story, and skills and techniques can be better reflected on consoles and PCs, which makes it hard for Europe's mobile RPGs to develop at a rapid pace, not unlike the situation in the US.



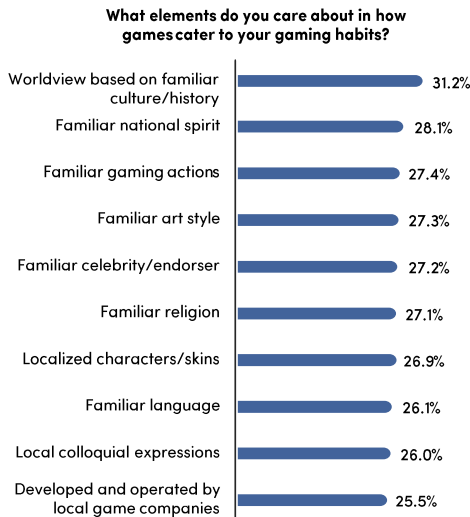
**Focus on local culture and history:**

When strengthening localization in Europe, consider focusing on integrating more local culture and history. European players value their local history, national spirit, and religious beliefs, preferring games with worldviews that are based on cultures they are familiar with.

**Work with creators to reach more user groups:**

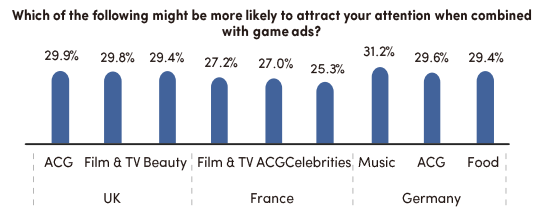
**High preference for creators:**

Localization in the European market can be achieved through creators. European players have a higher preference for content with creators, which can encourage them to download and return to games.



**Large variation in crossover elements:**

When looking for content for creator collaborations, try crossover content that leverages different industries. Different European countries have different preferences for different industries. For example, UK gamers are more interested in crossovers between anime and comics, beauty, and games; French players are more interested in crossovers between film and TV and games; and German players prefer crossovers with music, food, and games.



**Breaking through competition from other gaming devices, there are opportunities for turn-based RPGs in Europe.**

**Classic turn-based RPGs are preferred by players and have a high market share:**

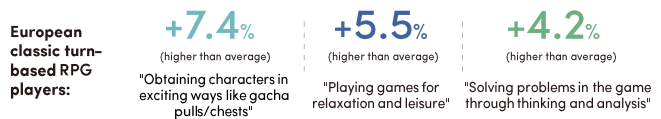
Turn-based RPGs are favored by most players and currently have a relatively higher share of the market in terms of revenue and volume. There is currently no top game with a clear advantage in this category, so there are still market opportunities for newcomers.

41.3% of European RPG players have played classic turn-based RPGs in the past six months. Among 2023's top RPG mobile games in Europe, classic turn-based RPGs account for 22.3% of revenue and 25% of volume, both ranking top 1.

**Turn-based RPGs match players' interests and sidestep competition from other consoles:**

From the user's perspective, common features of turn-based RPGs such as gacha pulls/chests, casual play, and strategy are in line with the preferences of European RPG players. Notably, compared to other types of RPGs, turn-based RPGs de-emphasize elements like sophisticated controls and competitive difficulty, and adapt well to mobile interfaces. The category is also less common for European console games and PC, which helps companies achieve differentiated user acquisition on mobile games.

In terms of RPGs, which of the following game elements are you more interested in?

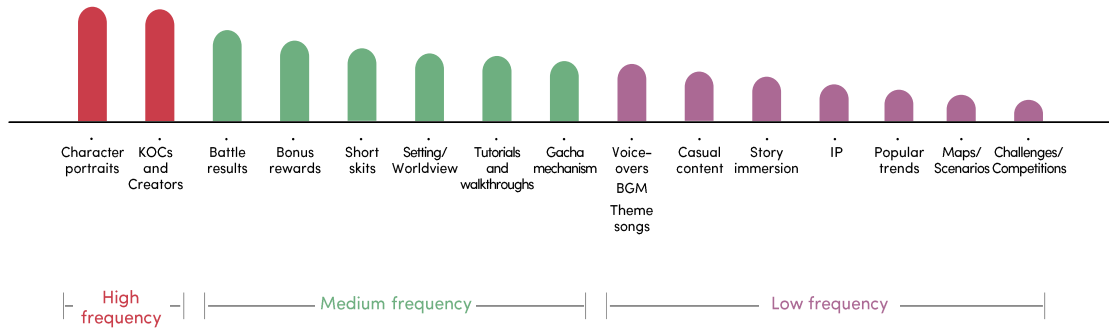


Tips: Based on the opportunities that turn-based RPGs have in Europe, the following will focus on how this category can utilize TikTok to further improve user acquisition.

Europe

European turn-based RPGs: Utilize diverse TikTok creators and gacha pull bonuses to drive player conversions.

Selling points of performance ads creatives of top games on TikTok\*



Combination of creative selling points:

Combination	Creative content	Target audience
1 Character portraits + Gacha mechanism	A popular character in the game is finally added to the card pool, and a voiceover and animation showcases the character's art design and features. After grabbing the viewers' attention, the video emphasizes the number of free gacha pull given to players that download now, highlighting the low level of entry to attract players.	Using a voiceover to mimic a major news announcement captures viewers' attention. In following, a comprehensive description of characters to enhance their perceived value can entice viewers to download the game by offering a free gachapull promotion.
2 Creators + Setting/worldview + Popular trends	The creator opens the video by asking the audience "Have you heard of this game?" Then, the creator introduces the background, game features, and other selling points of the gameplay and showcases in-game footage. Finally, the creator emphasizes that this is the hottest game right now and calls for the audience to download and try it out.	Starting with a question appeals to viewers' curiosity. The description of the game's worldview and gameplay allows the audience to learn more about the game's content and determine whether it suits their personal preference, while emphasizing that it is "the hottest game" that stimulates the audience's desire to try the game out.
3 Creators + Battle results + Tutorial and walkthrough	The creator compares two popular characters in the game, comparing their skills, damage output, leveling difficulty, and other details from the perspective of a seasoned gamer. At the end of the video, the creator refrains from making a choice, leaving the ending open-ended and full of suspense, compelling the audience to download the game and see for themselves.	The professional analysis of the game is more attractive to core players familiar with RPGs, and the format of comparing characters also sparks debate and discussion among players.

Case study of creatives:

Character portraits + Gacha mechanism	CTR Top: 13%	KOCs and creators + Popular trends + Setting/worldview	CTR Top: 16%																		
<table border="1"> <thead> <tr> <th>Opening</th> <th>Middle</th> <th>Ending</th> </tr> </thead> <tbody> <tr> <td>The character display and voice-over describe the experience of being addicted to gacha pulls.</td> <td>Explains the reason for the gacha pull craze, and that every character has its own unique design and skills, while continuing to display the roster of characters on the screen.</td> <td>Transitions from showcasing character skills to exciting combat scenes, and then tells the audience to hesitate no more and download the game.</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Opening	Middle	Ending	The character display and voice-over describe the experience of being addicted to gacha pulls.	Explains the reason for the gacha pull craze, and that every character has its own unique design and skills, while continuing to display the roster of characters on the screen.	Transitions from showcasing character skills to exciting combat scenes, and then tells the audience to hesitate no more and download the game.					<table border="1"> <thead> <tr> <th>Opening</th> <th>Middle</th> <th>Ending</th> </tr> </thead> <tbody> <tr> <td>Emphasizes that the game has over a million downloads since its launch, hinting that it is a popular game, with the creator's exaggerated expression helping pique the audiences' curiosity.</td> <td>The creator introduces the game's art style and other features, and offers a time-limited redemption code for bonuses to encourage downloads.</td> <td>The creator further explains the worldview and gameplay, showcasing a corresponding combat animation, and emphasizing once again that the game is free to download.</td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Opening	Middle	Ending	Emphasizes that the game has over a million downloads since its launch, hinting that it is a popular game, with the creator's exaggerated expression helping pique the audiences' curiosity.	The creator introduces the game's art style and other features, and offers a time-limited redemption code for bonuses to encourage downloads.	The creator further explains the worldview and gameplay, showcasing a corresponding combat animation, and emphasizing once again that the game is free to download.				
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\*Selling points of creatives of top games on TikTok in the past year, excluding organic content.

Europe

# Hot hashtags that can be used with turn-based RPGs on TikTok in Europe:

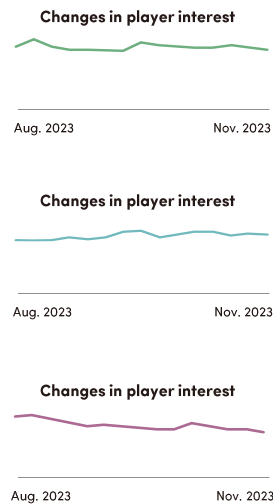
Search for creative inspiration from the following hot hashtags!

Hashtag	Views
#sketch	1.671 billion views
#dancechallenge	636 million views
#kindheit (childhood)	568 million views
#dessinACG	307 million views
#fanart	288 million views
#illustration	192 million views
#doublage (voice-over)	186 million views
#pokemongo	140 million views
#arena	71 million views
#gamingmeme	19 million views

**#illustration**  
Silly dubs of favorite game characters or ACG characters often have a fun and playful effect, and the lower creative effort required can also encourage other players to participate.

**#dancechallenge**  
Dance challenges are one of the best events to showcase one's personality and creativity, and are in line with TikTok users' willingness to express themselves. Game companies can post videos of characters dancing and encourage players to imitate the dance to attract more viewers.

**#fanart**  
Videos under #fanart usually include players' creative depiction of characters and settings and are often combined with elements like community interaction and pop culture, giving viewers the opportunity to appreciate the game's art and participate.



Note: Views statistics from August 2023 - November 2023 are the sum of views in the UK, France, and Germany.

## Example of creative TikTok content based on hot hashtags!

Hashtag	#illustration #sketch	Hashtag	#summonerswar
<b>Performance data</b>	Views <b>225.1k</b> Comments <b>71.2k</b>	<b>Performance data</b>	Views <b>18.2k</b> Comments <b>3,232</b>
<b>Video content</b>	An art creator makes a drawing of the game's tragic character Schneider. The video shows the drawing process and the final picture, with the high quality of the drawing garnering plenty of views.	<b>Video content</b>	A cosplay content creator decides to cosplay as their favorite character in the game. Although the character is not the most popular, the creator still shares the costume-making process and expresses their love for the character.
<b>Creative analysis</b>	<ul style="list-style-type: none"> <li>Showcasing part of the drawing and then the overall finished piece from the artist's perspective creates an immersive effect and a sense of surprise as the drawing unfolds, keeping viewers engaged throughout.</li> <li>The crying image of the character in the drawing suits her tragic end in the game and can elicit sympathy from players.</li> </ul>	<b>Creative analysis</b>	<ul style="list-style-type: none"> <li>The incomplete cosplay adds to the authenticity of the content, making it more believable for viewers and sparking engagement in the comment section as viewers relate to the creator's emotions.</li> <li>The first half shows that this is a small, insignificant character, while the second half speaks to the creator's strong feelings towards the character, the contrast capturing viewers' interest.</li> </ul>
<b>Case study</b>		<b>Case study</b>	

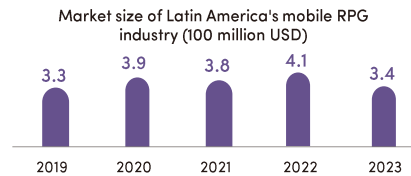
Data source: TikTok Creative Center, AppGrowing

## 3.7 Brazil market insights

### Market challenges and opportunities

The market size has declined slightly, but it's important to focus on its future potential.

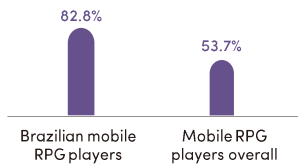
In recent years, the overall scale of the mobile RPG market in Latin America has declined. This is mainly due to the fact that the overall regional economy has yet to experience rapid development. Although the region has a large population base, there is not enough consumption in terms of cultural entertainment and gaming. However, the Latin American market has some of the greatest potential. The increasing prevalence of smart devices, device upgrades, and increased income will bring opportunities for the development of the RPG market. Companies can focus on the development potential of this market.



#### Focus on ACG elements:

When entering the Brazilian market, developers can consider focusing on ACG themes, which players have shown a very high preference for.

Proportion of players who have played ACG games and enjoy ACG culture



#### Focus on story elements:

Among ACG-related content, Brazilian players pay more attention to the games' story, and will download, be retained, and return to games because of the plot.

The impact of game storylines on Brazilian mobile RPG players



### Brazilian players prefer flexibility, so open world RPGs have greater potential.

**High preference for flexibility:** Brazilian players have a higher preference for games with more flexible gameplay, which has to do with the more mature and flexible gameplay of Brazilian console games. There are relatively fewer mobile games with highly flexible gameplay. In the future, open world RPGs and highly flexible MMORPGs may hold the most potential.

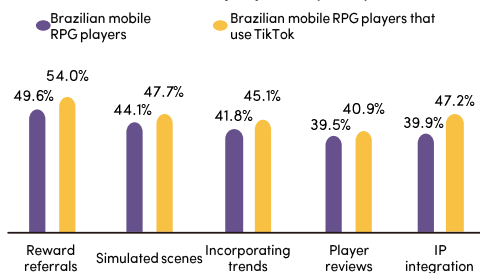
**53.2%**  
Brazilian mobile RPG players want games with an open world that can be explored.

**Tips:** Based on the opportunities that open world RPGs have in Brazil, the following will focus on how this category can utilize TikTok to further improve user acquisition.

#### KOC creators:

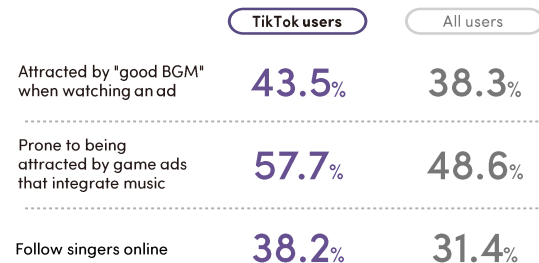
Brazilian players prefer content with KOC creators compared to ads that showcase gaming elements and 52% of players prefer ads featuring real people. TikTok has a higher proportion of content featuring KOC creators, and players have a higher preference for content with KOCs.

Which of the following creative elements of ads with KOC creators do you prefer? (TOP 5)



#### Music:

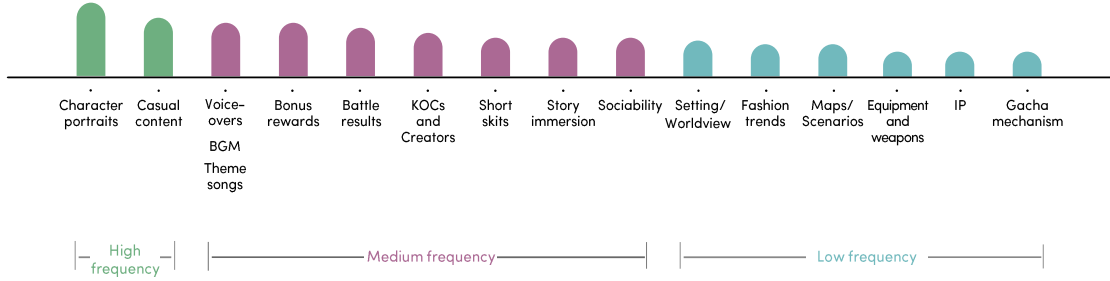
Brazilian players pay attention to the element of music, and it plays a crucial role in their reasons for downloading games and in their choice of creators. Furthermore, Brazilian mobile RPG players on TikTok pay even more attention to music. TikTok campaigns that incorporate elements of music can more effectively influence players from different groups.



Data source: Gamma Data (CNG)

# Open word RPGs in Brazil: Using TikTok with voiceovers, BGM and casual gaming content can demonstrate the game's versatility and expansive world.

## Selling points of performance ads creatives of top games on TikTok\*



## Combination of creative selling points:

Creative combinations	Creative content	Target audience
1 Character portraits + Casual content	Characters moving freely in the game world, freely engaging in non-competitive events like farming, foraging, driving, fishing, and flying in different settings.	Instead of combat features, this format emphasizes casual features as the main selling point of the game and showcases the natural movements of character models to hint at the game's superior quality.
2 Voice-over/BGM + Battle results	Content featuring popular beats on TikTok as BGM with clips of characters using skills edited with snippets of character dialog.	Combining three-dimensional character images with popular BGM helps attract young players who enjoy following trends.
3 Creators + Sociability	Attractive creators film videos cosplaying as game characters and show their game ID at the end of the video, inviting the audience to add them in the game.	Featuring attractive creators can instantly capture viewers' attention, and displaying the creators' personal game ID at the end of the video not only encourages the audience to download the game but also shows that creators have actually played the game, increasing viewers' trust.

## Search for creative inspiration from the following hot hashtags!

Hashtag	Views	Potential hashtags	Changes in player interest
#tentañoirir (try not to laugh challenge)	1 billion views	#jogoterror (horror game) The thrill of horror content compounded with the real-time reaction of TikTok streamers makes for interesting content that many gamers like to watch.	Line graph showing fluctuating interest from Aug. 2023 to Nov. 2023.
#animação (ACG)	694 million views	#topjogosandroid (top Android games) Most Brazilian players use Android devices, so hashtags related to the Android OS are more effective in reaching the target audience.	Line graph showing fluctuating interest from Aug. 2023 to Nov. 2023.
#funnymoments	667 million views		
#jogoterror (horror game)	13 million views		
#mundoaberto (open world)	4 million views		

Note: Views statistics from August 2023 - November 2023.

## Creative case analysis:

Hashtag	#tentañoirir (try not to laugh challenge)	#blackclover (black clover)	#mundoaberto (open world)
Creative content	Creators try not to laugh as they watch animated clips. At the start of the video, the creator drinks a bunch of water and holds it in their mouth as they watch funny animated clips that make the creator laugh, adding an entertaining element to the video.	For a game based on an ACG IP, the first half of the video features clips from the original ACG to rapidly jog fans' memories, and the second half features in-game footage that shows the game's recreation of classic characters and settings.	The video starts with a cosplayer making funny and exaggerated movements that quickly attract the attention of viewers. After the opening, the video shows a ranking of three open world RPGs.
Case study			

Data source: TikTok Creative Center, AppGrowing

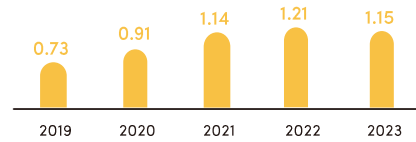
## 3.8 Middle East market insights

### Market challenges and opportunities

The RPG market is smaller but may expand along with the growth of the mobile game market.

Board games, card games, and strategy games are more prevalent in the Middle East, so the mobile RPG market is relatively smaller. However, the mobile game market in the Middle East is growing rapidly, and the scale of the mobile RPG market may expand with the growth of the overall market in the future.

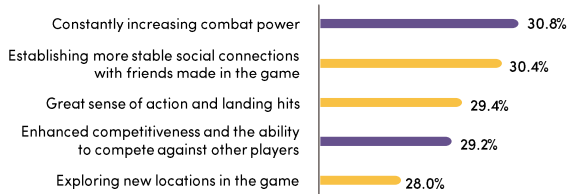
Market size of the Middle Eastern mobile RPG industry (100 million USD)



Middle Eastern players prefer competitive experiences, but mainly focus on competing with stats.

- Focus on improving stats:** Middle Eastern players have a higher preference for content regarding RPG stats. Content that involves competition and upgrading stats will attract more players to play the game.
- Focus on competition:** Middle Eastern RPG players prefer competitiveness, with a significantly higher preference for competitive elements than other regions in terms of preferred game types and the motivation to continue playing.

Which mobile game experience do you value more?



31.3% of players are more interested in "competitiveness/PVP", and stats battles among players.

29.4% of players continue to play because they "enjoy the competitiveness in the game".

28.6% of players gave up on a game due to "weaker competitiveness".

- More "time-consuming and cash-intensive":** In the Middle East, whales account for 32.7% of paying RPG players, which is 1.38 times higher than that of players overall. 21.3% of Middle Eastern RPG players spend an average of over 4 hours on mobile games per day, with a percentage that is 1.51 times that of players overall.
- Willing to pay more to improve combat power:** Middle Eastern players are more willing to pay to increase their combat power, and Middle Eastern mobile RPG players that use TikTok are even more willing to pay to improve their skills and stats to level up faster.

Among mobile RPG players in the Middle East

32.7%

Spend an amount equal to whales.

21.3%

Spend an average of over 4 hours per day on mobile games.

Which of the following makes you want to pay in a mobile game?

Middle Eastern mobile RPG players that use TikTok

+7.2%

(higher than average)  
"Directly increasing combat power stats"

+5.7%

(higher than average)  
"Leveling up faster and play for shorter periods of time"

+16.3%

(higher than average)  
"Raising my VIP level"

### Better opportunities in strategy RPGs:

Currently, the RPG market in the Middle East is still in the early stages of development. Therefore, the market needs to leverage gameplay and themes that local players are familiar with to expand further. Since Middle Eastern gamers are more familiar with strategy games and prefer war themes, combining strategy gameplay and RPG gameplay could provide better market opportunities.

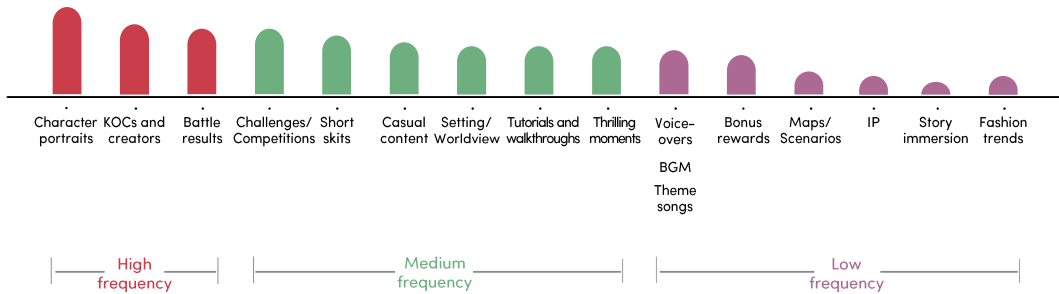
41.4% of RPG players prefer war themes

37.5% of RPG players are also strategy games players

Tips: Based on the opportunities that strategy RPGs have in the Middle East, the following will focus on how this category can utilize TikTok to further improve user acquisition.

## “ Middle East strategy RPGs: Incorporate live-action skits on TikTok and in-game footage to showcase the game's competitive experience.

### Selling points of performance ads creatives of top games on TikTok\*



### Combination of creative selling points:

Creative combinations	Creative content	Target audience
1 KOCs and creators + Battle results	The creator complains that they were deceived by fake ads, then introduces a true "honest" game and shows actual in-game footage to emphasize the real gaming experience.	Uses the experience of being tricked by fake ads to relate to the audience, which is then contrasted with real game footage to pique the audience's interest.
2 KOCs and creators + Character portraits	The creator starts by listing the game's excellent performance, such as its high-scoring reviews, millions of downloads, or rave reviews on global servers, then shares the reason with the audience that the game has a unique art style, rich characters, etc.	The fantastic statistics pique the audience's interest through herd mentality, creating the impression of a "high quality" game.
3 Short skits + Thrilling moments	The villain bullies weaker players with his higher combat power, but the heroic protagonist steps in at the critical moment and defeats the villain with an even more powerful pet/equipment in the game.	The upgraded version of comparing combat power, coupled with a story focused on helping to fight injustice is more in line with the cultural background and preferences of Middle Eastern players.

### Search for creative inspiration from the following hot hashtags!

Hashtag	Views
#efootball (eFootball)	272 million views
#سلطان (Sultan)	180 million views
#tiktokarabgamer (TikTok Arab gamers)	131 million views
#تكنولوجيا (Technology)	67 million views
#اونتاکو_انمي (anime otaku)	57 million views

**#تكنولوجيا (Technology)**  
Middle Eastern TikTok users have a strong long-term interest in technology-related hashtags. Including technology-related elements in the video or emphasizing that the game itself is a technical feat are common techniques for promoting games.

**#سلطان (Sultan)**  
The term "Sultan" means "powerful leader or ruler" and plays an important character in Middle Eastern history. Sharing relevant content can encourage interactions between gamers who like history or strategic and military elements.

**Changes in player interest**

**Changes in player interest**

Note: Views statistics from August 2023 – November 2023 are the sum of views in Saudi Arabia and Turkey.

### Creative case analysis:

Hashtag	#اونتاکو_انمي (anime otaku)	#الملوك_تحدي (King Challenge) #اكسبلور (Explore)	#tiktokarabgamer (TikTok Arab gamers)
Creative content	A creator cosplaying as an ACG character walks down the street, and their life-like costume attracts the attention of many passersby. Lots of people greet the creator and ask for photos together, demonstrating the popularity of ACG IP in the Middle Eastern market.	The creator portrays various characters from different regions in the game in a humorous story about conflicts and arguments between the characters, alluding to how the game features competition between different regions.	A fan comments that they want to see the game's protagonist take on tens of thousands of villains at once. The streamer sets up the scenario as requested by the fan and tries to take on the challenge but ends up failing.
Case study			

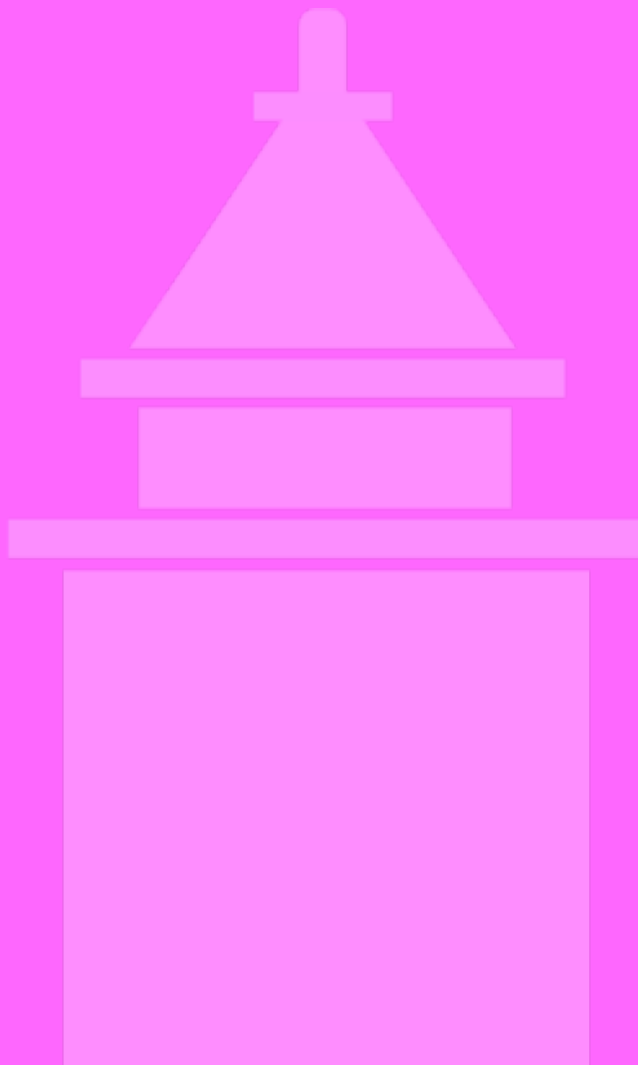
Data source: TikTok Creative Center, AppGrowing



# 04

## Insights on global RPG marketing trends

- Improvements in signal infrastructure can help companies better obtain data signals and complete the first step of ad delivery. At the same time, it is necessary to leverage ad products focusing on deep conversion to reach more high-value RPG core players and achieve better performance.
- Brandformance can help enhance the effect of marketing efforts and overcome the challenges of paying for user acquisition, which may help companies expand their reach, reduce costs, and increase efficiency across various stages of life cycles.
- The long-term operation of game lifecycles is a key area that most gaming companies focus on. It requires a strategy for marketing effectively in each stage of the game lifecycle in order to achieve long-term game operations and breakthrough growth.

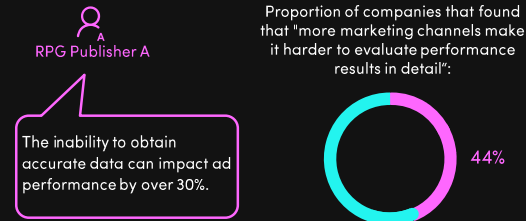


## 4.1 Focus on enhancing signal infrastructure and effectively executing the first step in advertising.

Improvements to signal infrastructure help to improve marketing efficiency, as high-quality signal data is the key to improving results.

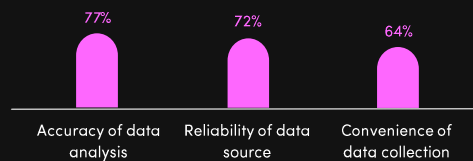
### Company trends

More marketing channels makes it harder to evaluate performance in detail. With too many channels, low quality and inaccurate user data will affect the results of an ad's performance.



Game companies are paying more and more attention to the quality of data signals. Most companies pay attention to factors like the accuracy of data analysis, reliability of data sources, and convenience of data collection. Successfully obtaining in-game event signals has become the key to successful user acquisition. Low quality and inaccurate user data will affect ads results.

### Key points of concern for game companies in terms of data



### Player trends

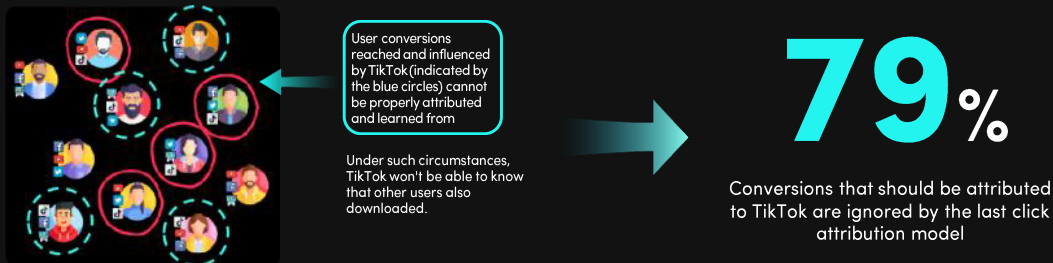
RPG players have a wide variety of behavioral touch points, using more than one social media platform. Research data shows that they use an average of over 4 types of social media, resulting in more complex touch point behavior. For example, they might use platform A and platform B, or other multi-platform channels, at the same time.

### Average number of channels used by mobile game players to obtain game content



With too many user touch point channels, relying on MMP Last Click for attribution makes it harder to evaluate the real value of platforms. For example, a user might tap on an ad on platform A, but this could be attributed to many ads that the user saw on platform B. Attribution models that rely on MMP have their limitations, because MMP only attributes downloads to the last platform to reach the user.

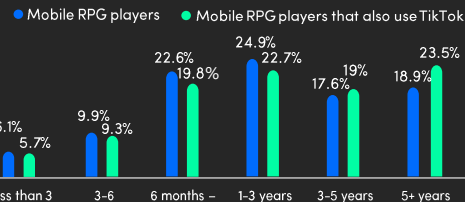
MMP mainly uses cross-channel attribution logic



With the above attribution methods, some high-value signals may be lost, and the click-through attribution model cannot fully reflect TikTok's value and actual user impact.

Additionally, research data shows that TikTok has more high-value RPG players. For example, TikTok users pay more attention to games at each stage than non-TikTok users. Also, on TikTok, there is a higher percentage of long-term RPG players, with more RPG players that have played for more than five years than the overall average.

### Among the mobile game you're playing, what is the longest duration you've played a game for?



### TikTok users pay a lot of attention to games at every stage.



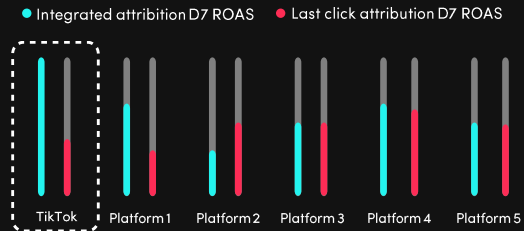
Data source: Gamma Data (CNG), TikTok Marketing Science Post-Purchase Analysis conducted by KnoCommerce, 2022

## 4.1 Focus on enhancing signal infrastructure and effectively executing the first step in advertising.

Additionally, research data shows that users exposed to TikTok have a higher D7 ROI across all omnichannel platforms, but under the traditional last click attribution model, TikTok's D7 ROI is unremarkable.

Therefore, to measure and understand TikTok's impact on users' multiple click-through points, we cannot rely only on MMP.

Integrated attribution analysis shows that TikTok has higher D7 ROAS than other mainstream channels.



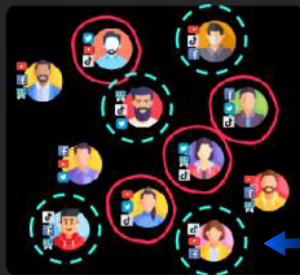
### TikTok for Business Self-Attributing Network (SAN)

- A new and independent mobile measurement partner (MMP) platform integration offers improved functionality that can help advertisers better understand the actual contributions TikTok makes to the conversion of app promotion campaigns based on performance-based advertising. TikTok can learn about conversions more accurately and provide a more accurate conversion report on TikTok's Ads Manager.
- SAN can offer advertisers more optimization signals and help advertisers accurately identify TikTok conversion data, find high-value users, and improve ad performance.

As the SAN platform, TikTok enables us to check and attribute all downloads made because of TikTok ads.

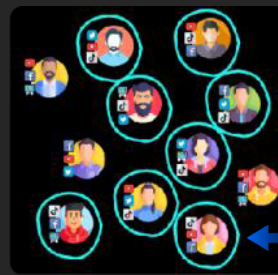
Migrating to a SAN allows advertisers to see more accurate data and understand the value and impact of TikTok ad promotion.

#### Before migration: MMP obey the cross-channel attribution rules.



User conversions reached and influenced by TikTok (indicated by the blue circles) cannot be properly attributed and learned from.

#### After migration: TikTok will adopt its own attribution rules.



User conversions reached and influenced by TikTok (indicated by the blue circles) can also be properly attributed and learned from.

### Advantages of migrating to a self-attributing network (SAN):

**Better data optimization and attribution reports**

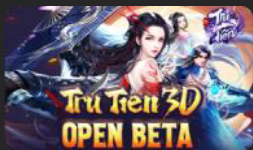
High-quality data can improve the relevance of ads, allowing advertisers to more accurately understand and assess the impact and value of TikTok.

**Explore more solutions**

The optimization of more downstream products and models helps advertisers achieve more effective performance in future ad promotions.

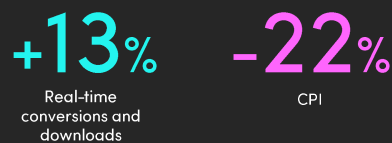
**Customized attribution window**

Advertisers can change attribution window settings and options directly on TTAM.



Gamota is an APAC game developer that completed the transition to and testing of TikTok SAN in May.

Performance after migrating to TikTok SAN:



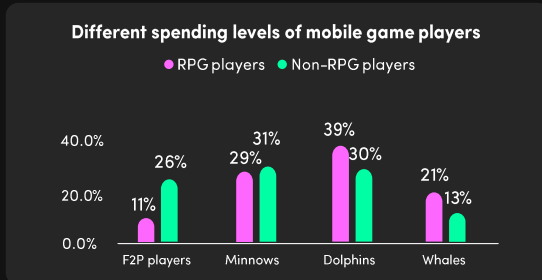
Data source: Metric Works, 2022 US market analysis, TikTok for Business case study data

## 4.2 Ensure effective growth by improving advertising performance through product upgrades.

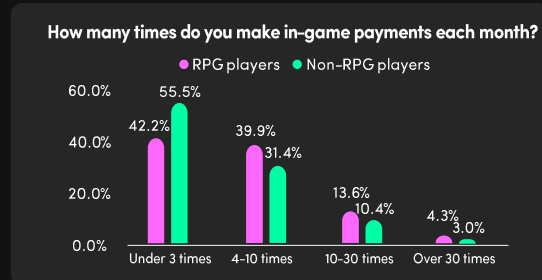
“ Leverage ad products focusing on deep conversions to reach more high-value RPG players and improve ad performance.

### Player trends

**High spending levels:** Compared to non-RPG players, RPG players have higher spending levels, with a higher percentage of whales and dolphins than other categories.



**High spending frequency:** Compared to non-RPG players, RPG players pay more frequently. There are more RPG players who pay over 4 times per month than in other categories.



### Challenges for companies

- **Difficulty in acquiring high-value users:** Finding long-term retention, high-value RPG players is the key to generate revenue for companies, but it is becoming increasingly challenging and expensive to find high-value users.
- **Decreased user acquisition efficiency:** After the large-scale deployment of performance ads, the user pool for games will continue to decrease, and user acquisition efficiency will continue to drop, making it hard to complete deep conversions of additional users.

RPG Publisher A

“As the game life cycle progresses, it becomes increasingly difficult to find high-value users, and costs also rise rapidly.”

RPG Publisher B

“RPG games don't have advantageous life cycles, making it hard to achieve long-term success by relying on products alone. However, focusing on user acquisition can effectively extend the product life cycle.”

### Ideas for solutions

1. Adopt different user acquisition strategies for different game life cycles and continue to optimize advertising strategies.
2. Add spending frequency to optimization goals, find users with high spending levels and high spending frequency and complete deep conversions to meet in-depth optimization needs.

### Solutions

#### New title launch stage: Maximum Delivery + MAI for rapid volume boost

- For new mobile RPG users assessing CPA, we suggest starting MAI 2 days before the launch of the new game to accumulate events data to optimize models. Also, it's important to focus on selecting high-quality creatives during the MAI stage to prepare for the AEO & VBO promotion stages.
- Leverage Maximum Delivery x MAI as much as possible for a rapid volume boost during the new title launch stage to rapidly accumulate data to feed the model, and if necessary, use Cost Cap sparingly to optimize the overall cost. For iOS, use Maximum Delivery as much as possible to give the model enough time to explore.

#### Liveops stage:

##### Android:

- AEO+VBO delivery optimizes the overall account payment model.
- AEO Every optimizes multiple payments, reducing the conversion cost of each payment and increasing overall payment conversion levels. RPG games generally have more front-end payment points and more payment ladder settings. We recommend allowing AEO Every synchronization tests in the early stage.
- Leverage SPC to optimize the advertising operating experience and reduce advertising manpower.

##### iOS:

- AEO and VBO with APPO can obtain more signals to improve models.

## 4.2 Ensure effective growth by improving advertising performance through product upgrades.

“ Leverage optimized product combinations to achieve game marketing goals.




General players	Active players	Paying players	High-value paying players
<b>MAI</b>	<b>AEO</b>	<b>AEO</b>	<b>VBO</b>
Focus of search: Players that install and try the game	Focus of search: Active and retained players	Focus of search: General paying players	Focus of search: High spending players
Indicators Download and install	Indicators Level up, join teams, complete tutorial, log in	Indicators Complete payments	Indicators Payment amount

### “ Core optimization product – AEO Every

By satisfying the in-depth optimization demand of RPG games, AEO Every (payment frequency optimization) can help the game gain more high-frequency paying players.

Products	AEO Every (multiple payment optimization)	AEO Once (paying player optimization)
<b>Optimization principles</b>	<ul style="list-style-type: none"> <li>Use "every payment" as the key indicator for optimization and reporting.</li> <li>The model looks for players who are likely to make more than one payment.</li> <li>Suitable for monetization models where most players make multiple payments.</li> </ul>	<ul style="list-style-type: none"> <li>Use "first payment" as the key indicator for optimization and reporting.</li> <li>Suitable for monetization models where most players make a single payment in a short period of time.</li> </ul>
<b>Examples of measurement principle</b>	<ul style="list-style-type: none"> <li>Budget: \$12</li> <li>Payment conversions for the same player: 3</li> <li>Payment conversion record: 3 times</li> <li>CPA record: \$4</li> </ul>	<ul style="list-style-type: none"> <li>Budget: \$12</li> <li>Payment conversions for the same player: 3</li> <li>Payment conversion record: 1 time</li> <li>CPA record: \$12</li> </ul>

### “ Goat Games – Dungeon Hunter 6

Advertising objectives	Volume & ROI	 AEO Every spend ratio  Total performance ad spend for the first week  Single-day peak ad spend	100%
Markets	North America, Europe, Australia		\$35W+
Placement	TikTok		\$90K+
Bidding method	Maximum Delivery		
Product	AEO Every, SPC		

#### Achievement:



✓ Optimize the infrastructure plan to explore and learn, and gradually improve efficiency and volume

- 1) Budget: A starting budget of  $50 \times \text{CPI} \div 10 \times \text{CPA}$  helps the campaign quickly get through the learning phase, without any negative adjustments within 3 days.
- 2) Function: Quickly enter the deep conversion stage 3 days after ad delivery. Android devices use AEO Every to search for high LTV quality players.
- 3) Automation: Use the SPC smart campaign for smart creativity optimization to extend the life span of campaigns.

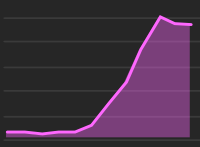
✓ Use the major promotion model to help the campaign rapidly boost volume

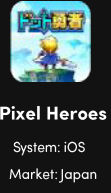
- 1) Quickly boost volume under the major promotion model, enabling an increase in ROI.
- 2) Support hourly data postback from the back-end model to improve optimization efficiency.

## 4.2 Ensure effective growth by improving advertising performance through product upgrades.

Utilize Pangle's solutions to reach a wider audience of RPG players and achieve greater growth, especially in Japan and Korea.

### New title launch stage:

<p><b>Product capabilities:</b> MAI x NTL model</p>	<p>The new title launch promotion model accelerates ad traffic distribution, helping the game quickly acquire low-cost activated players.</p>	<p><b>Background</b></p> <p>Pixel Heroes is a pixel-art RPG with lots of bonuses. The advertiser sought to use pre-registration ads in the Japanese market to entice more players to pre-register, reducing the pressure to acquire users during the new title's launch period.</p>	<p><b>Ad volume</b></p> 		
<p><b>Traffic distribution:</b> Traffic package x Preferred strategy</p>	<p>1. Flexible ad traffic options, including the game industry audience package, custom operation package, market selection package, etc. 2. Incentives, interstitials, organic content, etc.; a one-stop platform including different ads formats.</p>			<p><b>Solutions</b></p> <p>Web conversion</p> <p>1. Secondary pop-up for confirmation of event tracking: Add a pop-up before the landing page redirects to CPP and use the confirmation button for optimization event tracking. This increases optimization depth, while also significantly boosting the pre-registration rate. 2. Implement traffic protection measures for shallow conversions to proactively block traffic that poses a risk to pre-registration.</p>	<p><b>Ad performance</b></p> <p>Pre-registration rate above average for all channels at <b>30%</b></p> <p>Actual pre-registration cost lower than expected at <b>18%</b></p>
<p><b>Tool tuning:</b> Metric optimization</p>	<p>Threshold tools help support new game launches and optimize various indicators.</p>				



### Liveops stage:

iOS	Android
<p><b>Integrated multi-signal model</b></p> <p>Integrate valuable signals such as SKAN, MMP, traffic, and format, using the Private Optimization model to sense advertising conversion events quicker and more comprehensively.</p>	<p><b>AEO Every high-frequency paying player acquisition</b></p> <p>Product strategy upgrades efficiently obtain high-frequency paid traffic, together with high conversion/high payment potential traffic/audience targeting packages to adapt to high-frequency payment games and improve ROI.</p>
<p><b>CTA conversion path optimization</b></p> <p>Adapt SKOverlay to support the dynamic pop-up of CTAs and shorten the conversion path.</p>	<p><b>AEO Every x Cost Cap x daily cost control</b></p> <p>For users who have high demands for daily cost stability for AEO Every products under CC to help stabilize daily costs.</p>
<p><b>MAI x AEO x VO</b></p> <p>Threshold tools help support new game launches and optimize various indicators.</p>	<p><b>AEO Every x Maximum Delivery x Budget distribution optimization</b></p> <p>More reasonable distribution of advertising budget, and accurate search for suitable ad traffic.</p>

### 4399 《モリノファンタジー：世界樹の伝説》 JP

4399 leverages AEO Every to optimize performance to acquire more players that make repeat purchases while also utilizing the CC bidding method to achieve lower CPP (cost per purchase), which significantly increases ROI.

<p><b>+37%</b> ROAS 7d</p>	<p><b>+143%</b> ROAS 1d</p>	<p><b>-40%</b> CPP (payments)</p>
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Data source: TikTok for Business case study data

## 4.3 Brandformance helps to reach a broader audience across long-term operations.

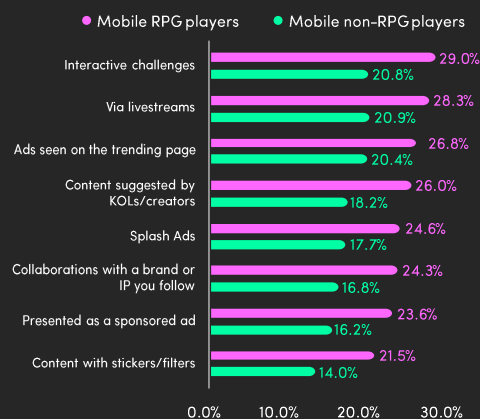
“ The cost of user acquisition during long-term operations will continue to increase, so the brandformance strategy is key.

### Player trends

#### Users are highly receptive to brand events:

Brand marketing methods like creator content and creative stickers are widely followed and favored by RPG players, have a wider audience base, and may help improve user conversion.

#### In which of the following ways do you prefer to obtain game-related information?



### Company challenges

- **It is difficult to quantify the effect:** It can be difficult to get substantial feedback after ad delivery and therefore harder to invest more in branding ads.
- **Continuous performance ads in the long-term cycle leads to bottlenecks and higher user acquisition costs:** In the liveops stage, publishers face higher and higher user acquisition costs, creating obstacles to acquire new users. Publishers need to enhance acquisition efficiency, reduce user acquisition costs and reach a wider range of target users.
- **It is difficult to acquire high-value users:** Branding advertising reaches users with its large exposure, but this also means reaching a wider user base instead of core high-value users.



RPG Publisher A

“Higher costs make it impossible to find your target at a reasonable price, which is what makes the steady promotion period so difficult.”



RPG Publisher B

“Branding ads can increase the popularity of games but this means advertising to an inaccurate user base, which may require significant resources for exposure in exchange for a few core users.”

### Ideas for solutions

Keyword: **Brandformance**

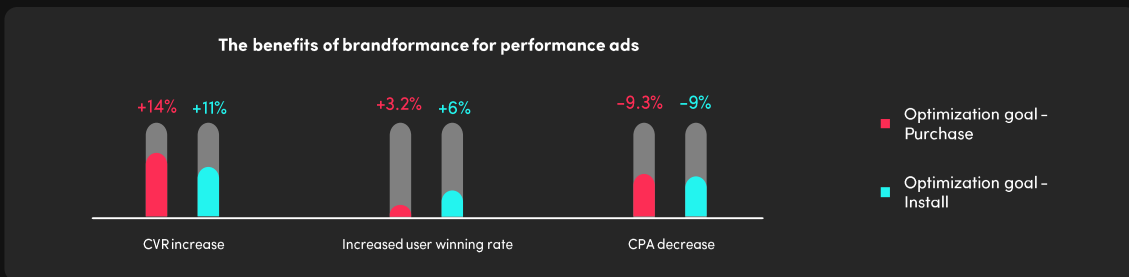
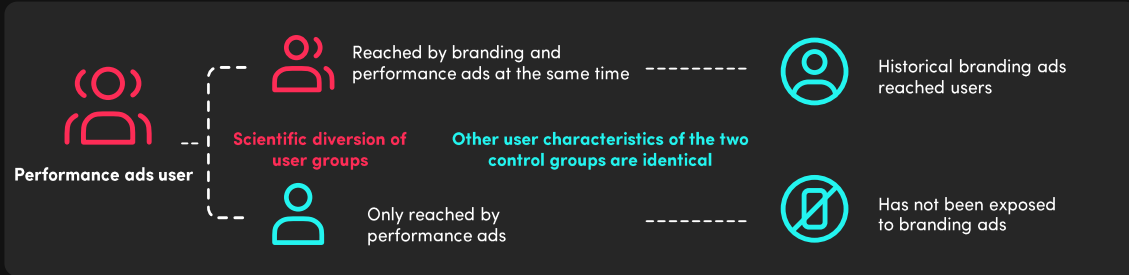
- Utilize a brandformance strategy to reach a wider audience, and use branding ads to assist performance ads, reducing the cost of performance ads while also increasing efficiency, and reaching more users that performance ads cannot reach.
- Utilize different brandformance strategies in different cycles, especially during the liveops period, and utilize brand marketing to discover and identify more high-potential groups, allowing users to grow from the niche to mainstream and overcoming the bottleneck of user acquisition.

### Solutions

- **New title launch stage:** On TikTok, utilize brandformance strategies for pre-registration and large-scale promotions, combining high-exposure brand ads and innovative advertising formats to attract core users to pre-register and achieve strong exposure during the new title launch stage to maximize brand volume.
- **Liveops stage:** During the liveops stage, it is necessary to steadily acquire high-value users and continue to explore ways to break through to new users. On TikTok, use the strategy (performance ads→branding ads→performance ads) to effectively reach potential high-value users and maximize the value of brand advertising.

## 4.3 Brandformance helps to reach a broader audience across long-term operations.

Brandformance verification scientifically measures gains to achieve growth in both branding and performance marketing.



### New title launch stage

By combining branding and performance ads during the new title launch period, companies can reduce user acquisition costs and achieve greater exposure.

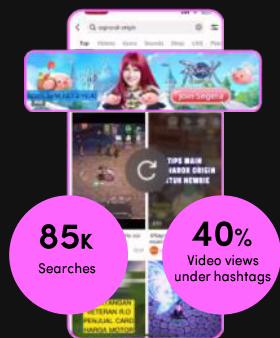
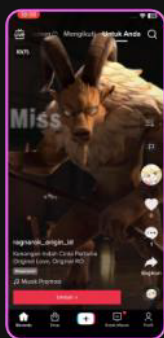
#### Pre-registration

In addition to using the Instant Page, combine interactive branding formats to create eye-catching effects and improve engagement and use countdown stickers and display cards to create a sense of anticipation and encourage players to pre-register.

#### New title launch

Aside from performance ads, the combination of TopView+R&F can be used to help games break out of existing groups. Additionally, search banner/livestream promotions can be used to expand reach and engage interested users, while the combination of a gaming UGC incentive program + Business account can be used to accumulate an exclusive fan base.

### Case study: New title launch | ROO



#### Project background

Huanle Entertainment - ROO launched in Southeast Asia in April 2023 and began promoting on TikTok in the latter half of March with a branding ads + performance ads integrated marketing strategy, which achieved widespread access to core users and general users, delivering impressive results through TikTok's integrated marketing solutions.

#### Solutions

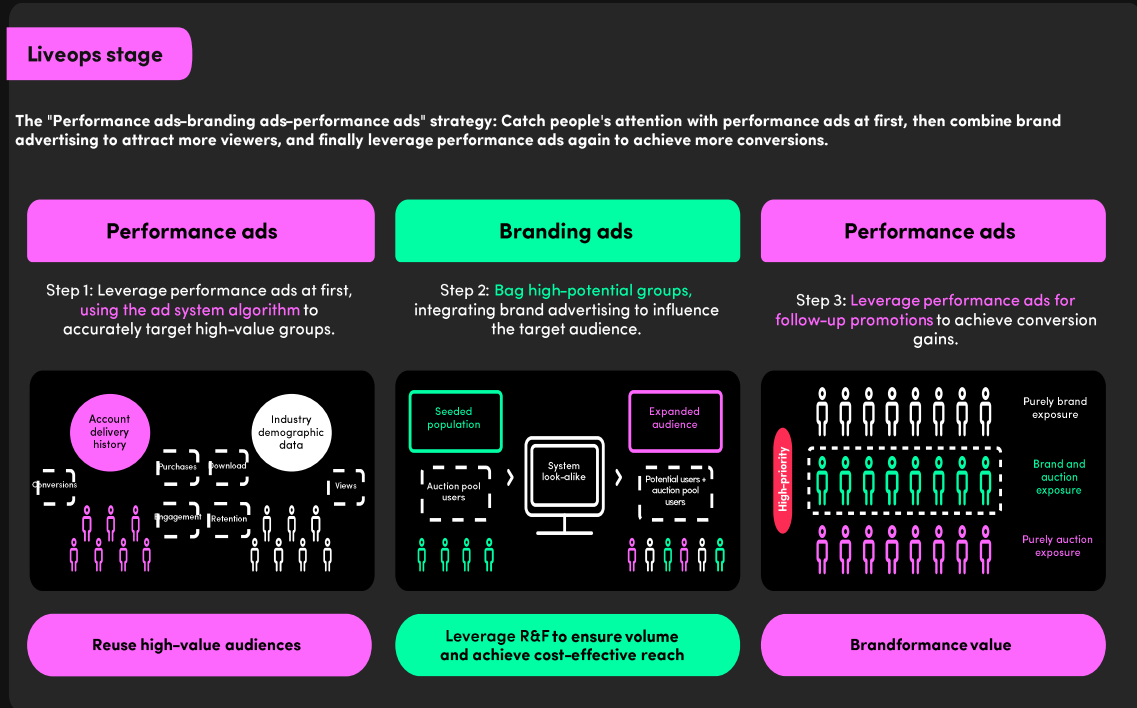
Branding ads: TopView (2days) + R&F (Top Feed x 31 days) + Livestreams + Branded Mission  
 Performance ads: MAI x Maximum Delivery + AEO x Maximum Delivery

	TH	ID	PH	MY	SG
Reduced costs	-21.9% Cost per download	-33.9% Cost per download	-24.3% Cost of exposure	-19.8% Cost per download	-53.2% Cost of exposure
Increased effect	+9.1% Download intent	+2.8% Ad click-through rate	+8.1% Brand favorability	+14.9% Download intent	+19.9% Download intent

Data source: TikTok for Business case study data



## 4.3 Brandformance helps to reach a broader audience across long-term operations.



In the liveops period, most advertisers will continue to deliver performance ads and encounter a bottleneck in the form of high user acquisition costs. With the help of performance ads-branding ads-performance ads strategies, **advertisers can use R&F products, together with high-value audience targeting packages and performance ads to achieve:**

### New audiences

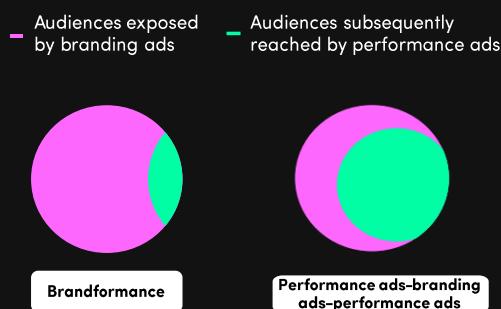
- Branding ads can help expose your brand to high-potential audiences, effectively helping performance ads reach a wider audience. **They can also tap into previously unidentified high-potential audiences that "may provide high value",** helping advertisers acquire high-value users that are difficult to reach through **performance ads alone.**

### Increased effectiveness

- After finding a high-value audience, these users are more likely to be converted and activated, which can effectively enhance marketing efficiency.
- The effect has a positive impact on KPI, achieving high user penetration and increased conversions.

### Reduced costs

- The diagram below shows why utilizing the performance ads-branding ads-performance ads strategy can reach a larger audience. **The intersection in exposure between branding ads and performance ads is larger, meaning that audiences exposed to branding advertising will be subsequently acquired by performance ads.** Therefore, the brand's marketing doesn't go to waste, and it can alleviate the high costs of user acquisition.
- Accumulate frequent payments in a short period of time to improve overall ROAS.



Data source: TikTok for Business case study data

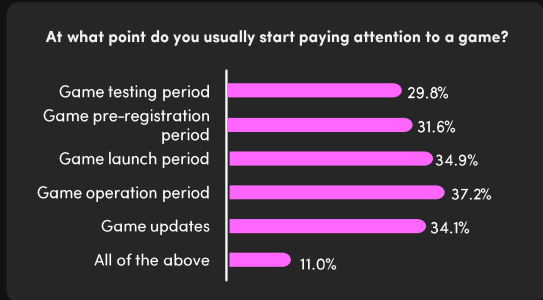
## 4.4 From ROI to LTV, full-cycle marketing strategies for achieving long-term operations.

“ There are marketing needs throughout the entire game’s life cycle, and platforms with full-cycle marketing capabilities have higher value.

### Industry trends

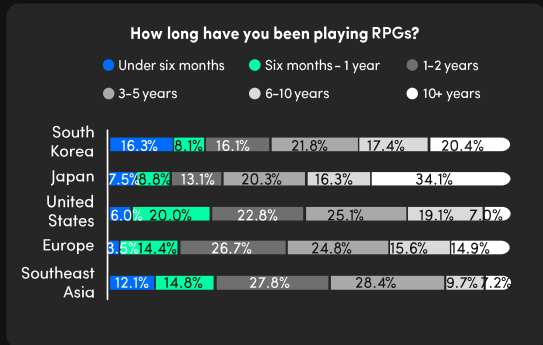
- **User attention is expanded to every life stage:**

Users pay attention to games at similar points of time, with more than 20% of users paying attention during each user acquisition period, and feel an increasingly strong connection regarding user acquisition during the game life cycle.



- **Adopt different life cycle strategies based on the gaming experience of RPG players:**

In terms of regional differences, Japan and South Korea have more mature players that are more experienced in RPGs. Players there have a longer "gaming history", with over 50% of players having played a single game for over 2 years. This provides the advantage of lower player education costs, but these players also have relatively fixed preferences, making it hard for games to reach new players. Therefore, it is important to maintain existing players and satisfy the game's full life cycle needs through long-term player retention. The US and Southeast Asia have more new players that are still getting used to RPGs, so attention should be paid to acquiring new players throughout the game's life cycle. Europe falls in the middle and can adopt operation strategies based on the characteristics of each game.



### Company trends

- **Full life cycle marketing strategies have become the focus:**

Many game companies have adopted long-term operation strategies as a breakthrough point for global business, and long-term operations throughout game life cycles will be the focus of companies going forward.

- **Full-cycle strategies lack guiding methods:**

Although companies focus on long-term strategies for games, they are not sure exactly how to carry them out and how to execute well.

The proportion of China outbound game companies that adopt "long-term operation" strategies



Note: The above data is sourced from specialized research conducted by Gamma Data (CNG) for gaming companies going abroad.



“When adopting a full-cycle strategy, you need to tell me why we are doing these things, because I need to convince teams with certain data and performance.”

### Ideas for solutions

**Keyword:** Full-cycle marketing strategy




- Focus on marketing effectively in each stage of the game life cycle, adopting marketing solutions to target the pain points and goals of each phase.
- Combine an ads strategy, content marketing, and community management to expand the long-term operation value of RPGs.

Data source: Gamma Data (CNG)

## 4.4 From ROI to LTV, full-cycle marketing strategies for achieving long-term operations.

“TikTok for Business full-cycle marketing strategy helps RPG companies achieve breakthrough growth.”

“Full-cycle marketing strategy” matrix in the gaming industry

Full-cycle		Pre-registration	New title launch	Normal Ops	Live Ops	
All capabilities	 Ads				Version updates/anniversaries	IP collaboration
		R&F (Top Feed)	TopView/R&F (Top Feed)	R&F (Standard Feed) + high-value audience targeting packages	TopView/R&F (Top Feed)	Branded Mission
		Landing page/direct link to store	MAI install	AEO/VBO	Search Banner	AEO/VBO
		Instant page	AEO shallow events	Android AEO Every	Branded Mission	Android AEO Every
		Interactive branding ads formats	iOS APPO	iOS APPO	AEO/VBO	
					Android AEO Every	
	 Content Marketing		Livestream		Livestream	Content solution packages
			Creators + Anchors	Creators + Spark Ads	Creators + Anchors	Creators + Anchors
	 Community Management	Follower acquisition in business account	Operations for specific game hashtags in business accounts		Event operations in business account	
			Gaming UGC incentive program	Operations for specific game hashtags in business accounts	Gaming UGC incentive program	IP collaboration in business account
					Innovative gameplay avatar frames	

Measurable

Signal infrastructure

Verification of branding and performance

Game audience index dashboard

BLS (Brand Lift Study)

CLS (Conversion Lift Study)

# Research method

## User surveys

### Survey overview:

The survey was mainly conducted through online questionnaires, with questions that included player information, gaming preferences, gaming behavior, and other targeting directions. The survey was conducted in the United States, Japan, South Korea, Southeast Asia (Indonesia/Thailand/Vietnam), Europe (UK/Germany/France), Brazil, and the Middle East (Turkey/Saudi Arabia).and etc. To better research the overall condition of mobile RPG players, the survey focused mainly on RPG players with non-RPG players surveyed for reference and comparison in order to better highlight the characteristics of RPG players.

### Total sample size:

N=10519

Mobile RPG players: 6,440; mobile non-RPG players: 4,079.

**Mobile RPG players:** Players who have played mobile RPGs in the past six months.

**Mobile non-RPG players:** Players who have played mobile games, but not RPGs in the past six months.

## Expert survey

### Survey overview:

The survey was mainly conducted through online interviews, with in-depth expert interviews for an average duration of 1 hour. The interviews covered topics including RPG marketing trends, regional market characteristics, etc., providing ample reference materials for the report.

### Total sample size:

In-depth interviews with 10 experts.

### Expert background:

Chinese RPG experts, including global marketing leaders and publishing experts, advertising optimizers, and creative experts.

# TikTok for Business

TikTok for Business aims to create a home for brands and marketers to be creative storytellers and meaningfully engage with the TikTok community. Our growing suite of advertising solutions delivers across every marketing touchpoint, enabling advertisers of any size to unlock real-world opportunities and drive business results.



Gamma Data (CNG) is a professional cultural and creative industry research and analysis organization with particular experience in the gaming industry. CNG releases a large number of in-depth research reports every year. The relevant data is widely cited in media reports, brokerage analysis reports, and game company research reports. Gamma Data (CNG) has accumulated a variety of resources and mature research methods in data analysis, and is committed to using data to mine the development characteristics of industries to better understand the future industry development trends, thereby promoting the development of games and other cultural and creative industries.

## Project team

Lu Huibo	Wang Hanhan	Xu Fanke	Chang Jian
Liu Qiyuan	Li Yarong	Li Zhuochun	Liu Shaoying
Wang Hecheng	Wang Huijie	Li Huijie	

Special thanks to AppGrowing

