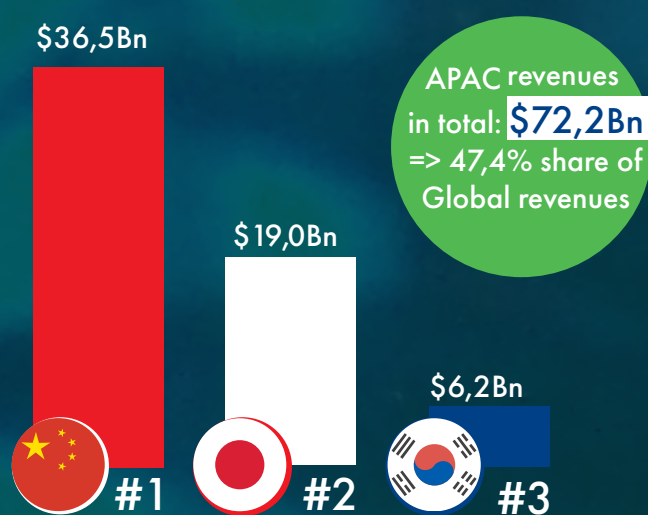


# GAMES MARKET STUDY

**CHINA**  
**JAPAN**  
**SOUTH KOREA**

## TOP COUNTRIES BY GAME REVENUE IN APAC AREA 2019



## CHINA



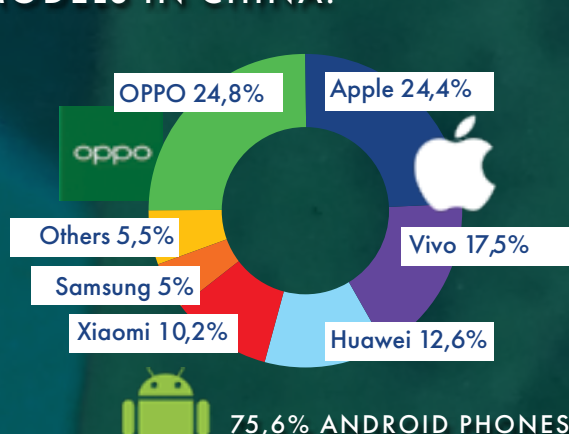
### MOBILE

- ✦ The number one platform in games market at China
- ✦ ANDROID devices are dominating mobile markets
- ✦ Google Play store is not available in China.

### PC

- ✦ More than 50% of the worldwide PC game revenue comes from China
- ✦ STEAM is a leading distribution channel for PC games.
- ✦ Other key channels include WeGame and Epic Store

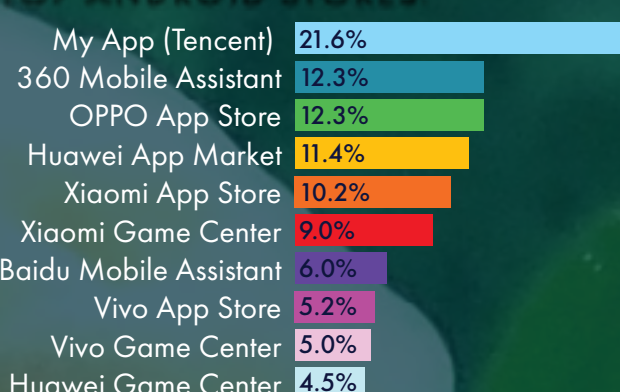
### TOP MOBILE BRANDS & MODELS IN CHINA:



### REGULATION:

- ✦ It is mandatory by law to have local, licensed partner, when publishing games in China
- ✦ Every game published in China needs to have an ISBN approval
- ✦ Content regulation
- ✦ STEAM & Epic Store are not officially available in China

### TOP ANDROID STORES:



## JAPAN



### MOBILE

- ✦ Number one platform in games market at Japan

### CONSOLE

- ✦ Second biggest platform in games market at Japan

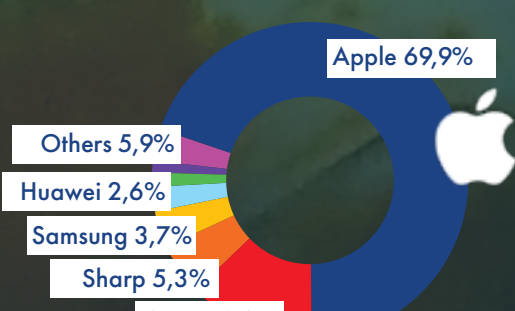
### PC

- ✦ Third biggest platform in games market at Japan

### REGULATION:

- ✦ Games are required to have an official Japanese age rating

### TOP MOBILE BRANDS & MODELS IN JAPAN:

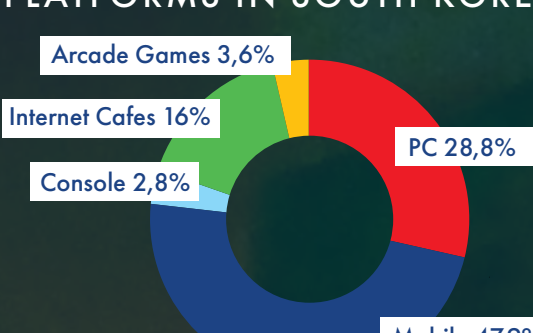


- ✦ Japanese mobile gamers are the biggest spenders in the world
- ✦ Japanese gamers are less competitive compared to Chinese and South Korean gamers.

## SOUTH KOREA



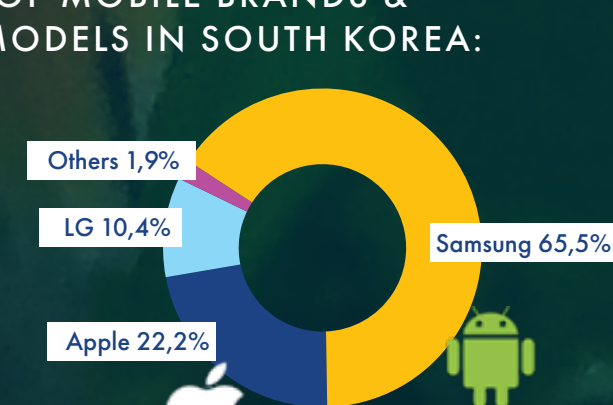
### PLATFORMS IN SOUTH KOREA:



### REGULATION:

- ✦ Games are required to have an official Korean age rating (GCRB)

### TOP MOBILE BRANDS & MODELS IN SOUTH KOREA:



## BEST PRACTICES

- ✦ Self-publishing in digital distribution channels (in Japan and South Korea)
- ✦ Strategic investment from local investors
- ✦ Offering outsourcing services for or buying them from Chinese/Japanese/South Korean companies
- ✦ Co-operating with with Chinese/Japanese/South Korean companies ie. publishing projects



### CREATE ENOUGH CONTENT TO PLAY

- ✦ Chinese, Japanese and South Korean players are content hungry



### CREATE ENOUGH TO SPEND

- ✦ Have solid KPI testing
- ✦ The opportunities to spend in games and get value for the money invested needs to build in the game from the beginning



### CREATE WELL LOCALIZED CONTENT

- ✦ Many of the local business partners and players of games in China, Japan and South Korea do not speak English
- ✦ Pay attention on the quality of translation and cultural differences in game.



### CREATE CONTENT THAT FOLLOW LOCAL RULES

- ✦ Check the local regulatory requirements



### UNDERSTAND THE LOCAL BUSINESS CULTURE

- ✦ More hierarchy than in Western countries
- ✦ Differences in working culture
- ✦ Always communicate respectfully