

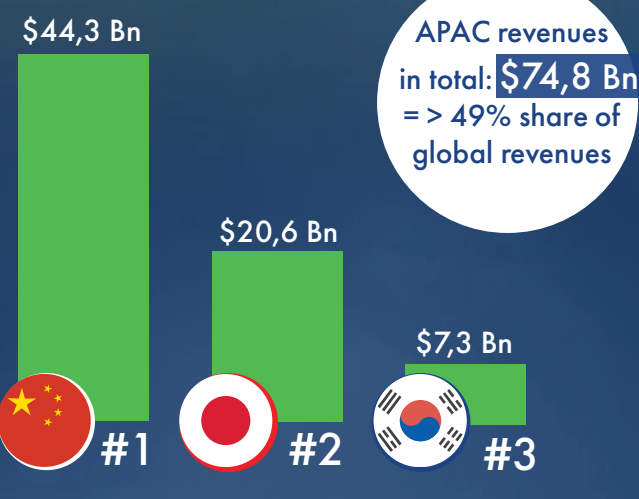
GAMES MARKET STUDY 2020

CHINA

JAPAN

SOUTH KOREA

TOP COUNTRIES BY GAME REVENUE IN APAC AREA 2020



CHINA



The WORLD'S BIGGEST market in games

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

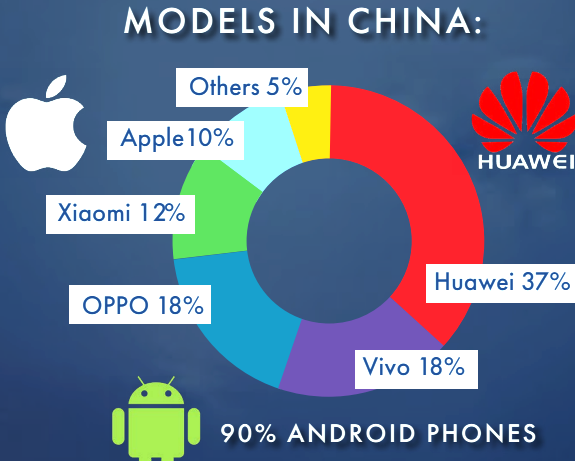
- ✦ Half of the worldwide PC game revenue comes from China
- ✦ DISTRIBUTION:
 - STEAM Global (China version)
 - STEAM China
 - Epic Store
 - WeGame (Tencent)

REGULATION:

- ✦ Mandatory to have local, licensed partner, when publishing games in China
- ✦ Every game published in China needs to have an ISBN approval (including Apple Appstore)
- ✦ Content regulation
- ✦ STEAM Global is not officially available in China



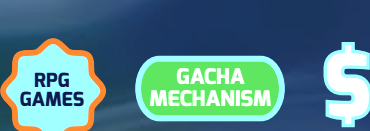
TOP MOBILE BRANDS & MODELS IN CHINA:



TOP ANDROID STORES:



JAPAN



MOBILE

- ✦ Number one platform in games market at Japan
- ✦ Apple makes 2/3 of consumer spends



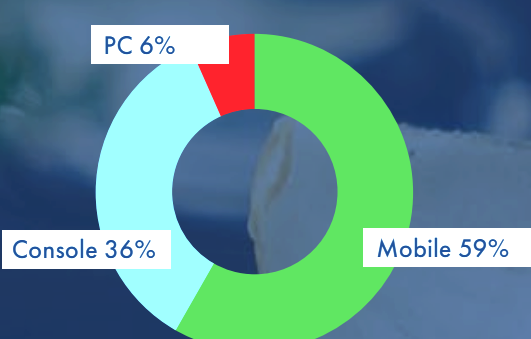
CONSOLE

- ✦ Great market share in platforms at Japan market

REGULATION:

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

TOP PLATFORMS BY REVENUE



PC

- ✦ Smallest platform in games market at Japan

SOUTH KOREA



MOBILE

- ✦ The number one platform in games market at South Korea
- ✦ ANDROID devices are dominating mobile markets

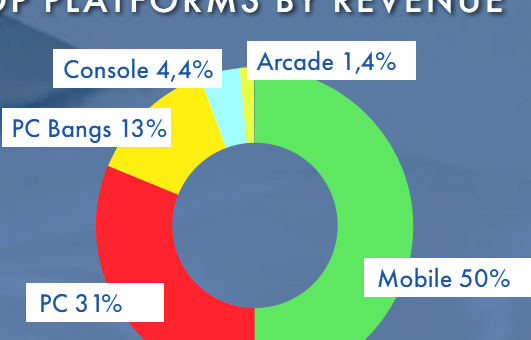
PC

- ✦ Big share at platforms in South Korean market
- ✦ PC Bangs (gaming rooms) are popular

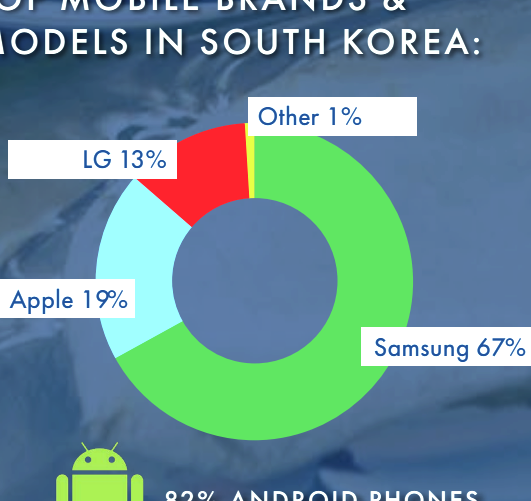
REGULATION:

- ✦ Games are required to have an official Korean age rating (CRAC)
- ✦ Domestic agent designation system
- ✦ Probabilistic items

TOP PLATFORMS BY REVENUE



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 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 in games has 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