GAME DEVELOPER'S GUIDE to the Chinese market

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Preface

Preface

The "Game developer's guide to the Chinese market" is the result of eight years of intensive research and the fruit of cooperation between the Polish Institute in Beijing, Indie Games Foundation Poland and numerous partners from Polish and Chinese gamedev industries.

When the Polish Institute in Beijing initiated its first video game promotion program in 2016, Chinese gamers were already quite familiar with Polish games, having played titles such as *The Witcher*, *This War of Mine* or *Dying Light*. Problem was, a majority of them didn't know those games were developed by Polish gamedev studios.

Thanks to continuous efforts by various institutions and the invaluable role of the studios themselves, releasing one blockbuster after another, Chinese gamers today dub Poland as yóuxì dàguó (游戏大国), meaning "gaming power". They appreciate the quality and creativity of Polish productions and recognize a growing number of Polish brands.

The purpose of this document is to provide Polish game developers with a reliable and exhaustive source of information about the Chinese gaming market, with a focus on premium PC/console games, which would guide and support them through the process of establishing their presence in China even further.

> **We hope the "Game developer's guide to the Chinese market" will contribute to your successful expansion to the Chinese market and help build the brand of Polish games in China!**

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01.

Part I – The basics

01.

Part I – The basics

1.1 Chinese Gaming Market

The past couple of years have been difficult for the world's biggest gaming market - organizational restructures and a crackdown on the industry over gaming addiction concerns, followed by a months' long freeze of the game approval process, resulted in the first ever decline in the revenue and gamer population in China in 2022.

However, according to data shared by the China Game Industry Group Committee, or CGIGC, an official Chinese supervision association under the National Press and Publication Administration (NPPA), the first half of 2023 witnessed an upward trend in gamer population, reaching a **record-breaking 668 million players** by the end of June, which constitutes roughly half of the Chinese population.

Simultaneously, **sales revenue generated by the domestic market reached 144.263 billion Chinese yuan ($20.23 billion) for the first half of this year** – though the data shows a 2.39% fall in revenue YoY, it also indicates a 22.2% increase in revenue QoQ, which proves the market is gradually emerging from the difficult period.

Chinese domestic market revenue

	Sales revenue	Player population
2014	114.481	517
2015	140.702	533
2016	165.566	565
2017	203.607	583
2018	214.443	625
2019	230.877	641
2020	278.687	664
2021	296.513	666
2022	265.884	664
2023 (FIRST HALF)	**144.263 billion CNY**	668 mln

Compiled based on data from *China Gaming Industry Report H1 2023*

| 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
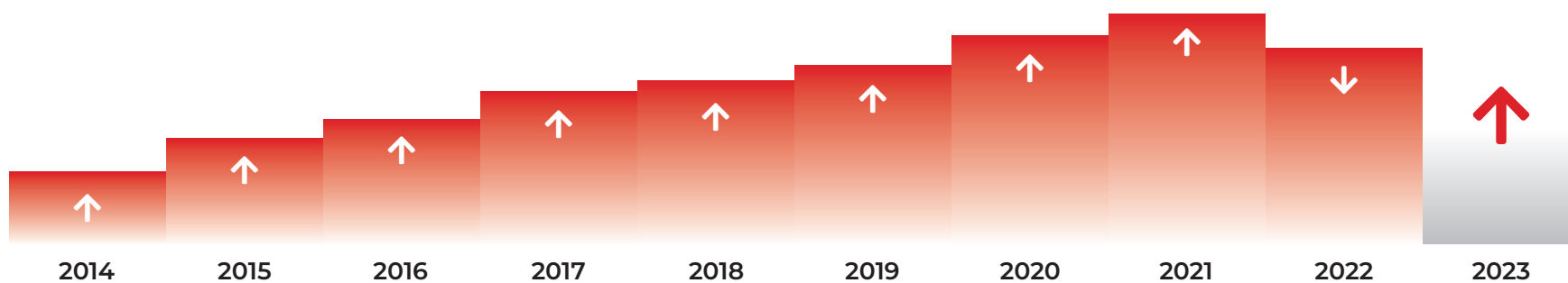
[1] "2023年1-6月中国游戏产业报告" (retrieved Nov 27, 2023)

1.2 Market Segments

According to the most recent data from the CGIGC China Gaming Industry Report[2], almost **2/3 of the revenue generated by the Chinese market comes from mobile games**, with the remaining **1/3 coming mostly from client games** (PC and console games), with marginal input from webgames and other products.

Chinese market revenue share

- 2.62% Other
- 1.83% Webgames
- 20.80% Client games
- 74.75% Mobile games
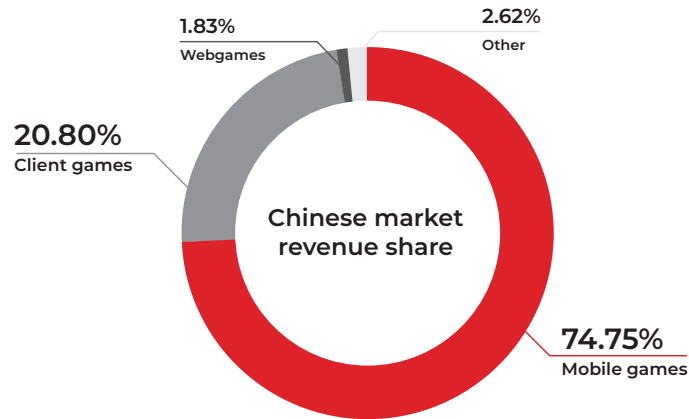
Compiled based on data from China Gaming Industry Report H1 2022

1.2.1 PC Games

Though the CGIGC China Gaming Industry Report suggests the revenue generated by the whole client game segment accounts only for about 21% of the total market revenue, PC games are very popular in China. According to the *CHINA PC GAMES MARKET & 5-YEAR FORECAST REPORT* published by Niko Partners[3], there were **322 million PC gamers in China by the end of 2022, generating a revenue of $14.2 billion**.

While the number of Chinese PC gamers amounts to almost half of the Chinese gamer population, they are **spread across a multitude of different platforms**, often exclusively playing their favorite online games, distributed through local stores. In order to estimate the number of players likely to purchase overseas games available through global distribution platforms, we should look at the number of Chinese users on STEAM Global.

The official number of Chinese MAUs on STEAM amounts to 30 million, however, since many Chinese players use VPNs to connect to the Internet, a more accurate estimate would be the percentage of users running the STEAM client in Chinese, which as of October 2023 amounts to 45,93%.[4] With 120 million MAUs[5], we can estimate **the number of Chinese STEAM players as about 55 million MAUs.**

Most popular languages used by gamers on STEAM

Simplified Chinese	45.93%
English	26.40%
Russian	7.29%
Spanish - Spain	3.59%
Portuguese-Brazil	2.99%
German	2.31%
French	1.66%
Japanese	1.52%
Polish	1.39%
Turkish	**1.11%**
Traditional Chinese	**0.85%**
Korean	**0.81%**

Compiled based on data from "*The Most Popular Languages on Steam in 2023*" by Logrus

1.2.2 Console Games

In 2000, amid fears they could have "adverse effects" on children and young people, Chinese authorities officially banned the distribution of consoles and console games in Mainland China[6]. While they remained available on the grey market, the ban and the unavailability of products in legal circulation had huge impact on the Chinese console gaming segment.

China's Ministry of Culture officially lifted the ban in January 2014, and the first console to debut on the Chinese market was Microsoft's Xbox One, which didn't hit the shelves until Septem-

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[2] "2022年1-6月中国游戏产业报告" (retrieved Nov 27, 2023)
[3] "CHINA PC GAMES MARKET & 5-YEAR FORECAST REPORT" (retrieved Nov 27, 2023)
[4] Logrus IT Game Localization, "The Most Popular Languages on Steam in 2023" (retrieved Nov 27, 2023)
[5] Brian Dean, "Steam Usage and Catalog Stats for 2023", (retrieved Nov 27, 2023)
[6] Tim CHEN, „China has finally lifted its 14-year ban on video games" (retrieved Nov 27, 2023)

ber of that year. Sony followed in Microsoft's footsteps a few months later, when it released the PlayStation 4 in March 2015.

Since until then the console game segment existed only on the gray market, accurate data concerning this market segment only reaches as far as 2015. It should be noted though, since local versions of consoles only provide access to games approved for local distribution, **many players prefer to import overseas consoles and purchase games from Hong Kong or Japan regional stores to access more games.**

According to the *CHINA CONSOLE GAMES & 5-YEAR FORECAST REPORT* by Niko Partners[7], there were **about 16.7 million console gamers in China by the end of 2022**, generating a **total revenue of $2.3 billion in hardware and software purchases**, both in the general and gray market segments. While console gamers are a comparatively small part of the overall Chinese gamer population, Niko Partners estimate the number of gamers will increase to 23 million by the end of 2027.

1.2.3 Mobile

It doesn't take much to notice the immense popularity of mobile games in China – take a ride on the Beijing subway, or enter any venue where people have to stand in line for more than a couple of minutes and you'll see people of all ages eagerly playing mobile games to kill time. The number of mobile gamers grew from 90 million in 2012[8], to **over 640 million in 2022**, according to the Niko Partners' *CHINA MOBILE GAMES MARKET & 5-YEAR FORECAST REPORT*, **generating over $30 billion in revenue** in the same year.

With that said, the vast majority of China's mobile gamers are casual gamers, for whom the main source of games are titles pre-installed on their smartphones, or free games available for download through app stores. Unfortunately, as most mobile platforms offer both f2p and premium games, it's hard to estimate how many mobile gamers in China are willing to pay for premium products.

1.2.4 VR and AR

The virtual reality (VR) and augmented reality (AR) segment in China differs from that of the European market, due in large part to the openness of the Chinese to new technologies. According to statista[9], the AR and VR market in China is projected to reach revenue

of $6.6 billion in 2023, with an expected annual growth rate of 11.91%. However, these numbers fall behind estimates from 2018, which shows that the VR and AR segment isn't growing as much as some experts anticipated, with most revenue still generated by hardware, rather than content distribution.

Multiple Chinese VR companies agree that **the fastest growing markets for VR and AR in China are professional training facilities and VR cafés, rather than individual players**. Often enough Chinese publishers approach overseas VR simulator game developers eager to distribute their products as professional training materials for vocational schools or training facilities. On the other hand, VR cafés are usually interested in party games that can be played casually by friends spending time together in their venues.

1.2.5 E-Sports

Various sources provide **radically different estimates of the size and value of the Chinese e-sports market segment**. The 2021 CGIGC China Gaming Industry Report estimated the market's value at about $20 billion, with a userbase exceeding 480 million[10]. On the other hand, statista estimates the market value in 2023 at $445.2 million, with the number of users projected to reach 253.5 million by 2028[11]. While the differences might be caused by different methodology, they are also an outcome of the quick expansion of the market, which makes it difficult to measure its actual value.

While the boom for mobile e-sports has contributed to quick expansion of the e-sports market, China became one of the leading e-sports nations in the early 2000s, when the Chinese authorities recognized e-sports as a sport[12]. In 2016, the Chinese Ministry of Education added "esports and management" to the list of permitted college majors for Chinese universities, while the Ministry of Human Resources and Social Security (CMHRSS) followed in 2019 by announcing recognition of "e-sports professional" and "e-sports operator" as two new official professions[13]. No wonder China is also home to many world e-sports champions.

[7] "CHINA CONSOLE GAMES & 5-YEAR FORECAST REPORT" (retrieved Nov 27, 2023)
[8] "2017 Global Mobile Game Industry White Book", MGMA, December 2017, pg. 949
[9] "AR & VR - China" (retrieved Nov 27, 2023)
[10] "2021年中国游戏产业报告" (retrieved Nov 27, 2023)
[11] "Esports – China" (retrieved Nov 27, 2023)
[12] "Esports Around The World: China" (retrieved Nov 27, 2023)
[13] Hongyu Chen, "Chinese Government Identifies Esports as a Profession, PUBG Details Esports Plans for China" (retrieved Nov 27, 2023)

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1.3 Challenges and Risks

The sheer size of the Chinese gaming market, paired with the high revenue it generates, undoubtedly sounds very tempting, but with opportunities come challenges and risks, which you need to face if you are to achieve success. Although foreign companies have to handle additional legal restrictions to game distribution (see PART 2.1.1), local companies face similar obstacles, including fierce competition, piracy and plagiarism.

1.3.1 Competition

According to data published by statista, over 10,000 games have been released on STEAM every year since 2021[14]. That's an average of almost 30 games per day, which makes it hard to stand out from the crowd, especially for indie game developers. With such fierce competition, even outstanding games can fail to reach their potential audiences without proper marketing and promotion, even more so on less familiar markets.

However, not all of those games make it to overseas players – some are titles developed by and for local markets, including China. While such games are at a disadvantage when competing on international markets, their developers know the respective local markets better. Therefore, when attempting to promote overseas games in China, **foreign game developers have to compete with both global blockbusters, and local indie games**, developed by Chinese teams for Chinese players.

1.3.2   Imitation games

Some of those games are so-called "shānzhài" or "imitation" games, which **verge on the border between inspiration and plagiarism**. Copying popular gameplay patterns or motifs is less risky for smaller gamedev teams, being more likely to attract potential investors and publishers. It might also be considered a form of tribute to the original game, especially if it doesn't have Chinese language localization or depicts a strange or unappealing cultural or historical background.

However, thanks to growing interest in the Chinese market, and increasing presence of overseas games on Chinese platforms, combined with simultaneous growth of Chinese publishers' interest in overseas markets, Chinese gamers have higher expectations towards new games, expecting more creativity and innovation. This, in return, encourages Chinese indie game developers to find their own place in a growing but diversifying market.

1.3.3 Cultural foreignness

Among the biggest challenges overseas companies face when trying to sell and promote their games in China is **cultural foreignness, experienced both by the game developers and the players alike**. Chinese players come from a different cultural background and might not understand or not relate to things that the developers consider natural and obvious.

The *Frostpunk* game is a perfect example of how different can cultural perspectives be – the city survival game developed by the Polish 11 bit studios, triggered a debate among Chinese netizens on how societies should be run, and what are the people's responsibilities when they're facing extinction. Upon completing the game, players view a recap of their choices and are asked the question: *The city survived...but was it worth it?*

11 bit studios / Frostpunk

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[14] "Number of games released on Steam worldwide from 2004 to 2023 YTD", (retrieved Nov 27, 2023)

Many Chinese players found the question enraging – on the one hand, they mostly consider video games a form of entertainment and are not used to games questioning their moral decisions, on the other hand, many of them believe that all means are justified as long as they ensure the survival of the society as a whole. Therefore, their experience from playing the game was completely different than that of Western players.

Another important cultural difference is humor – Chinese humor relies more heavily on puns and wordplay rather than situational or contextual humor. In other words, certain dialogues or situations considered funny in Western culture, might not pass as funny to Chinese players. To ensure the game's narrative resonates well in China, companies should **put necessary effort into the localization of the game into Simplified Chinese** (see PART 2.2).
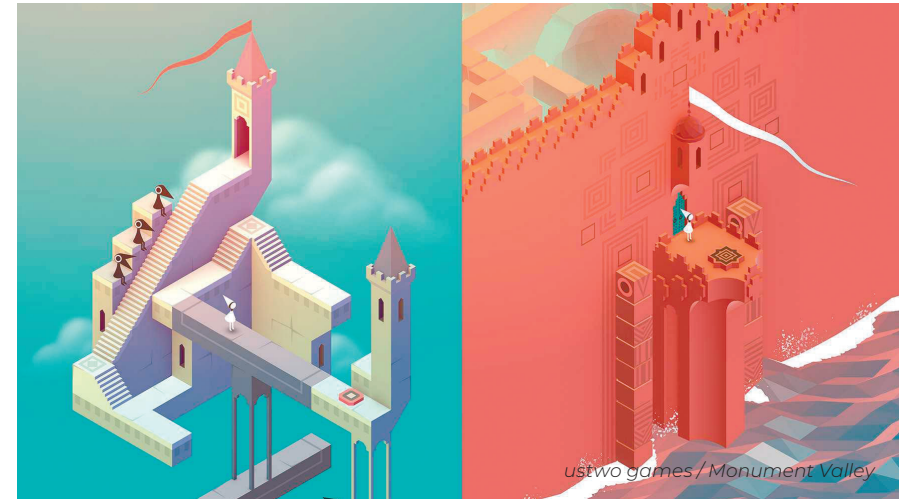
1.4 Trends

With almost 670 million players, discussing general market trends delivers little useful information – just like everybody else, Chinese players like casual games, action games, RPGs and FPS. However, with such a huge gamer population, **pretty much every game can find a niche of its own**, which can guarantee a good enough profit to justify the additional localization and promotional costs. Therefore, instead of discussing game genres, lets focus on game features, which increase the chances of a game's success.

In an article from 2017, Iain Garner, then Director of Global Developer Relations and Marketing at Another Indie, points out that Chinese players **prefer "cute" and "adorable" games with exaggerated characters** (typical of the Japanese "chibi" style), such as *Lost Castle*, as well as games with anime aesthetics, such as *ICEY*[15]. Luis Wong of INDIENOVA, on the other hand, recalls that while aesthetics reminiscent of Japanese anime are most popular among Chinese gamers, they also **appreciate games with a unique graphic style**, like *Monument Valley* and *Hidden Folks*. Wong also stresses that Chinese gamers rather dislike aesthetics straight out of Western TV shows such as *Futurama* or *Family Guy*.

Another key factor to a game's success is **whether or not the game supports multiplayer** – many Chinese gamers **consider games a means of socialization**, therefore online co-op is a must for titles wishing to attract greater audiences. Especially if it allows for **competition between players**, which is an important part of Chinese culture.

However, according to recent research by China indie Game Alliance, years of lockdown under the covid pandemic took their toll on Chinese gamers, who experience increased levels of anxiety and depression. Such players get **easily frustrated with challenging games**, especially if they don't include a tutorial, or the tutorial isn't clear enough. In effect, players are more likely to quit and leave a negative comment on STEAM if the gameplay is too demanding.

ustwo games / Monument Valley

XD International / ICEY

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[15] Priestman, Chris, "Steam games in China: Making the most of a lucrative opportunity" , (retrieved Nov 27, 2023)
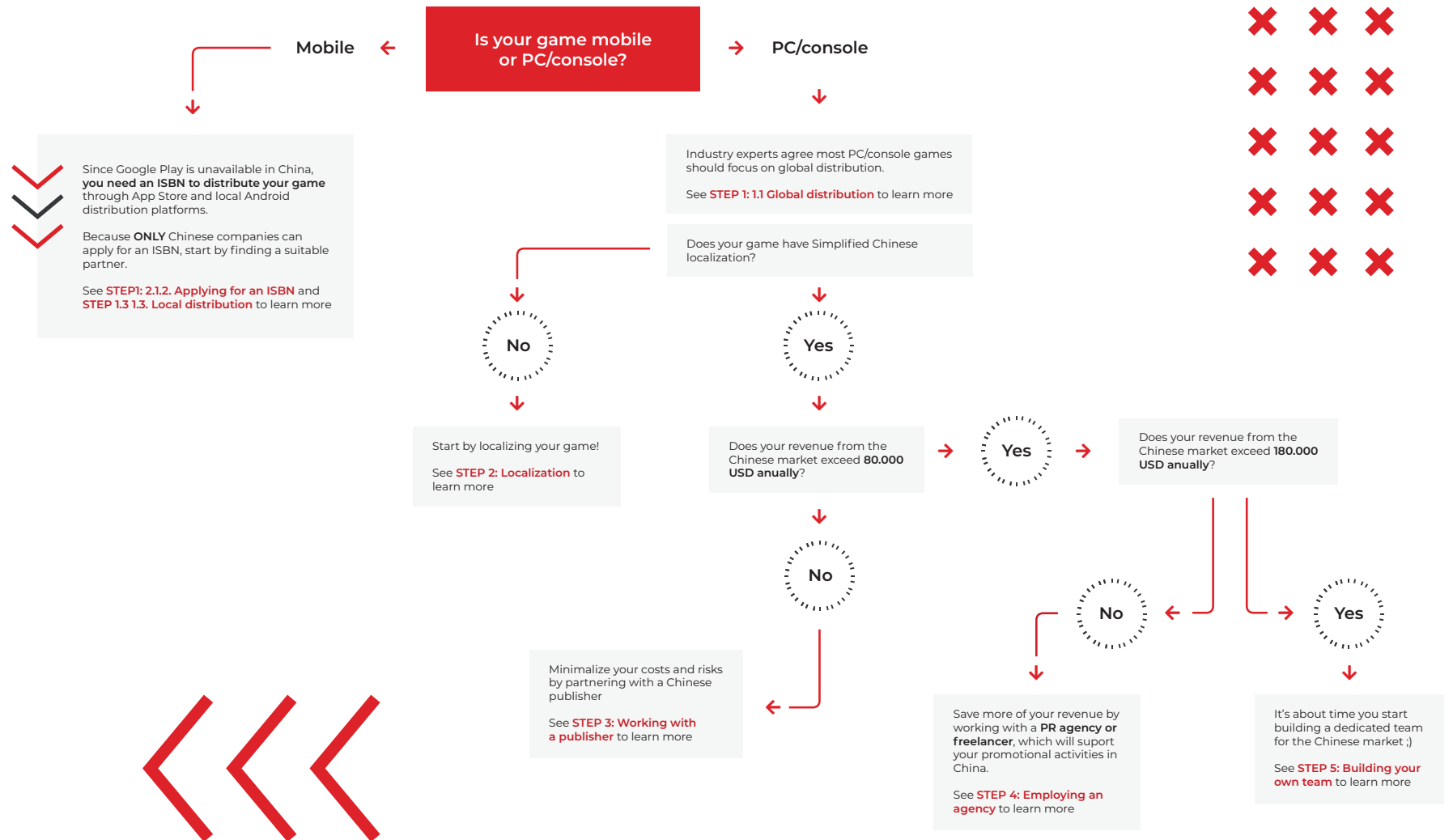
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02.

Part II – A step by step guide to the market

Part II – A step by step guide to the market

Is your game mobile or PC/console?

Mobile ←

PC/console →

Since Google Play is unavailable in China, **you need an ISBN to distribute your game** through App Store and local Android distribution platforms.

Because **ONLY** Chinese companies can apply for an ISBN, start by finding a suitable partner.

See **STEP1: 2.1.2. Applying for an ISBN** and **STEP 1.3 1.3. Local distribution** to learn more

Industry experts agree most PC/console games should focus on global distribution.

See **STEP 1: 1.1 Global distribution** to learn more

Does your game have Simplified Chinese localization?

No

Yes

Start by localizing your game!

See **STEP 2: Localization** to learn more

Does your revenue from the Chinese market exceed **80.000 USD anually**?

Yes →

Does your revenue from the Chinese market exceed **180.000 USD anually**?

No

Minimalize your costs and risks by partnering with a Chinese publisher

See **STEP 3: Working with a publisher** to learn more

No ←

Yes

Save more of your revenue by working with a **PR agency or freelancer**, which will suport your promotional activities in China.

See **STEP 4: Employing an agency** to learn more

It's about time you start building a dedicated team for the Chinese market ;)

See **STEP 5: Building your own team** to learn more

2.1.   STEP 1: PC/Console Games VS Mobile

While circumstances vary from one title to another, and risks and opportunities are subject to multiple outside factors, experiences shared by hundreds of gamedev studios attempting to distribute and promote their products in China make it possible to compile a "step by step" guide to the market. However, **the following guide should be considered a list of suggestions**, inferred from successful market practices, rather than a strict set of rules to follow.

The primary factor in determining a publishers approach towards the Chinese market is the game platforms their product is available on. While every game is different and may present its publisher with unique opportunities, the general agreement among industry experts is that **PC/console games should focus on global distribution** (ideally supported by local PR and marketing activities), while **mobile games need to apply for an ISBN required for local distribution**.

2.1.1 Global distribution

If you're a PC/console game publisher, chances are you're already selling your games in China, without even knowing it. Chinese players often buy games through global distribution channels – while Epic Store and GOG require access through a VPN, **STEAM Global is usually available without such difficulties**.

STEAM remains the most popular global game distribution platform in China to date. As previously mentioned in PART 1, 2.1, there are roughly **55 million MAUs**, which use Simplified Chinese as their preferred language on STEAM Global. And though talks continue about the global version of STEAM being replaced by STEAM China at some point in the future, no one is able to tell when or if that will happen.

Similarly, since local versions of **PlayStation Store**, **Microsoft Store** and **Nintendo eShop** offer a limited number of games (selling only those titles, which obtained an ISBN), players access overseas versions of the stores in order to gain access to more titles – **usually choosing the Hong Kong region** when buying games. While it's hard to estimate the exact number of such players, **Niko Partners estimates the number of console gamers in China at 16.7 million** (as mentioned in detail in PART 1, 2.2).
It is therefore **crucial that PC/console game publishers ensure their games support**

Simplified Chinese localization across all distribution platforms and regions, otherwise Chinese players might either skip the game altogether, or choose to download a pirated copy of the game with Chinese localization.

2.1.2 Applying for an ISBN

Global distribution is unfortunately not a viable option for mobile game publishers – Google Play is unavailable in Mainland China, and App Store requires publishers to provide an ISBN number before a product can be made available for Chinese users. Therefore, **mobile game publishers need to apply for an ISBN and opt for local distribution**.

Under Chinese law, games are considered a publication, and fall under special supervision of the State. **ONLY Chinese companies can apply for an ISBN necessary to publish a game in Mainland China**. Even foreign companies running an office or subsidiary in China **CANNOT** apply for an ISBN. Therefore, every foreign company needs to start by finding a local partner, who will submit the ISBN application to the National Press and Publication Administration (国家新闻出版署) on their behalf.

Cooperation with a local publisher shouldn't be treated as an unpleasant necessity though - a good partner will help you with localization, as well as marketing and promotion on local gaming and social media, often sharing the costs of such activities. Chinese players usually cannot access Facebook, Instagram or X, so without experience with Chinese social media you won't be able to reach out to your potential players. **The right partner will help you find your way on the market.**

Since China doesn't have an age rating system similar to PEGI or ESRB, generally **speaking all games applying for an ISBN must be appropriate for players of all ages.** That is why games shouldn't display blood or nudity or portray prohibited content such as drugs, gambling or organized crime. Furthermore, all game content must be consistent with the constitution and laws of the PRC, i.e. cannot threaten the security, unity or positive image of the Chinese state, or promote moral attitudes inconsistent with generally accepted norms. However, as the regulations operate in generalities, it's **crucial to find an experienced local partner,** who will have the expertise necessary to complete the application successfully.

2.1.3 Local distribution

Obtaining an ISBN might take several months (sometimes even up to a couple of years), and require changing in-game content. However, once your game obtains the ISBN, your partner can arrange the game's distribution through local platforms. What might seem pretty straightforward at first, is in practice very complicated, as the **local distribution market is highly fragmented**, both in case of mobile and PC games.

Since Google Play is unavailable in Mainland China, there are **dozens of different distribution channels for Android devices**, including app stores pre-installed by the device manufacturer (e.g., Oppo, Xiaomi, Huawei, Vivo etc.), general app stores downloaded by users themselves (e.g. Tencent App Store, 360 Games, etc.) as well as dedicated apps aimed directly at gamers rather than casual players, such as TapTap or Maozhua (猫抓) . Of course, Apple product users can download games directly from AppStore[16].

On the other hand, there's a limited number of local distribution channels for PC games, **the most important being Tencent's WeGame platform**. According to most recent data from 2020, WeGame has 300 million registered users and 72 million MAU[17]. However, since the plat-

form distributes only those games that have obtained an ISBN, it's offer is highly limited compared to global competitors, such as STEAM or Epic Games Store.

What is more, **obtaining an ISBN opens the door to Chinese cloud gaming platforms**, which are becoming increasingly popular. Having in mind that many Chinese gamers are high school and university students, who can't afford high-end gaming PCs and laptops, cloud gaming platforms offer them a chance to experience games that they wouldn't be able to play otherwise. There are currently tens of different cloud gaming platforms available in China, operated by many companies including Tencent, NetEase, Huawei etc.

An ISBN also **entitles game developers to promote their games through paid adds on social media**, such as Weibo or Bilibili. It should be noted however, that it's not entirely possible to target such adds at very precise groups of viewers, such as PC or console gamers, therefore paid marketing campaigns might work better with mobile games, as there's a higher chance they'll reach potential customers compared to PC/console indie games.

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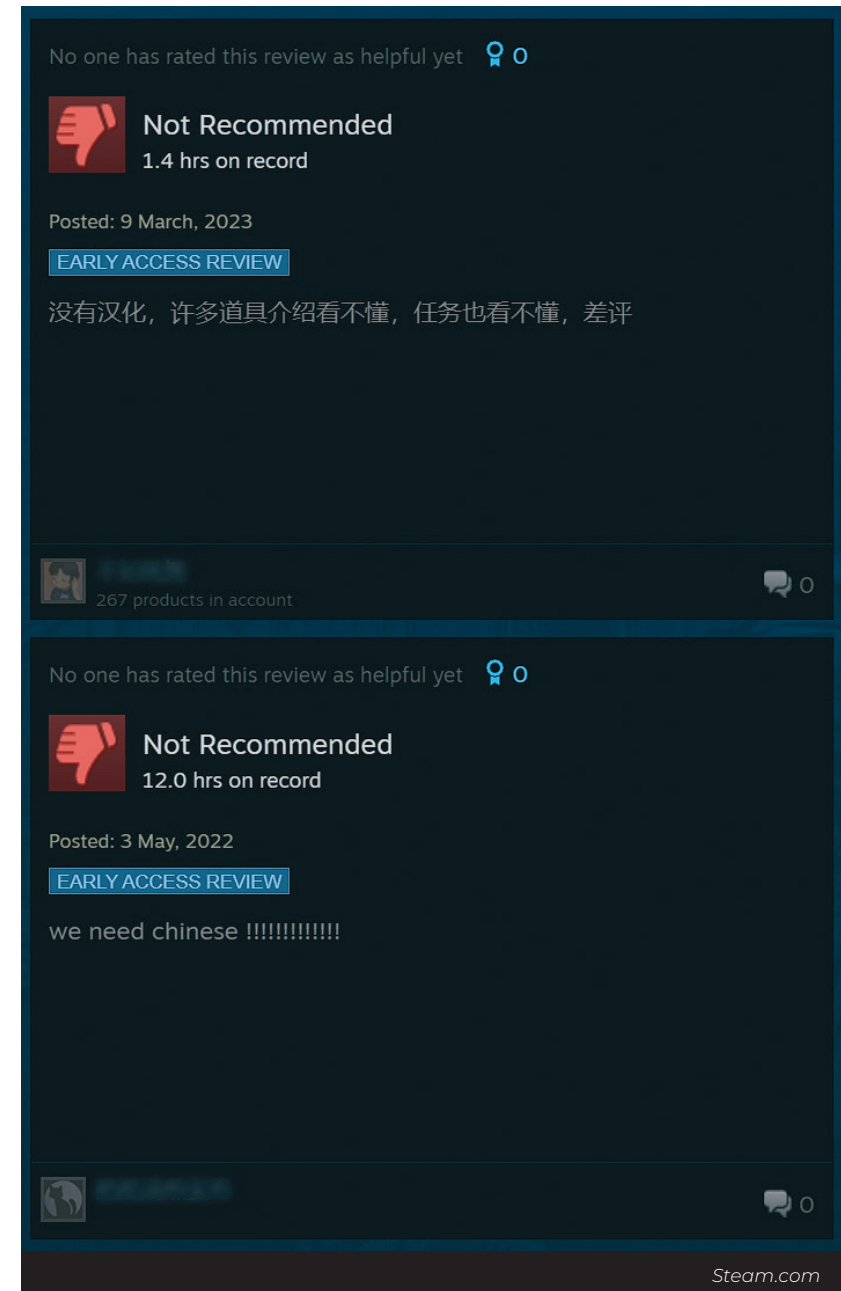
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[16] "游戏行业深度报告" (retrieved Nov 27, 2023)
[17] "腾讯版"Steam", 梦碎今秋？" (retrieved Nov 27, 2023)

2.2.   STEP 2: Localization

Despite a strong emphasis on English learning in Chinese schools and households, the **overall language proficiency is very low**. Very few gamers in China would be able to hold a conversation in English, not to mention keeping track of a game's dialogues and intricate plot. Therefore, while Chinese language localization might not be a priority for mobile game publishers (their products being unavailable for purchase in China prior to them obtaining an ISBN anyway), it is an **absolute MUST** for PC/console games.

Whether the publisher decides to distribute their games through STEAM Global or local platforms (in cooperation with a local partner), localization into Chinese will be one of the factors determining the game's success. So much so in fact, that **one of the most common negative comments on STEAM added by Chinese players is: 没有中文! (No Chinese language!)** Chinese players will often leave a game's STEAM page without reading the game description if Chinese is not among the supported languages – therefore even if a game has no in-game text except for the main menu, its product page should indicate Chinese language support as to not scare off potential customers.

No one has rated this review as helpful yet 🎗 0

👎 **Not Recommended**
1.4 hrs on record

Posted: 9 March, 2023
EARLY ACCESS REVIEW

没有汉化，许多道具介绍看不懂，任务也看不懂，差评

267 products in account   💬 0

No one has rated this review as helpful yet 🎗 0

👎 **Not Recommended**
12.0 hrs on record

Posted: 3 May, 2022
EARLY ACCESS REVIEW

we need chinese !!!!!!!!!!!!!

💬 0

Steam.com

2.2.1 Simplified VS Traditional Chinese

Before going further, it's important to first understand the difference between **Simplified** (usually abbreviated ZHCN), and **Traditional** (ZHT, ZH-TW or ZH-HK) Chinese. In theory, both are different variants of written Chinese; in practice, the difference between Simplified Chinese and Traditional Chinese could be compared to the difference between American and British English. However, since the majority of Chinese players use Simplified Chinese, **localizing the game into Simplified Chinese should be considered a priority.**

It's not enough to provide any localization though - Chinese players have high expectations for the quality of translation of foreign games, therefore it's important to **ensure quality**. Since both, Polish sinologists and Chinese polonists, receive little to no training in video game localization, it might be easier to find individuals and companies experienced in English to Chinese game localization.

Standard fees for English-Simplified Chinese localization vary between 0.06 to 0.12 USD per word. However, lower prices increase the risk of lower quality localization, with some translators having a turnout of 10 thousand Chinese characters per day (roughly around 20 pages of English text). Such translators won't find the time to download and play the game, and are prone to making mistakes in their translations, which Chinese players won't forgive.

2.2.2 Title localization

Another good practice is localization of the game's title. Very few Chinese players can speak any English at all, therefore **they might find it hard to memorize a foreign title**. Especially those composed of less popular words (e.g., typical for fantasy or science-fiction genres). Adding a Chinese title will make it easier for players to memorize the name, increasing the game's recognizability.

Localized titles should be added not only in the game descriptions on various platforms, but also in the game properties, to make sure players can use the Chinese title in the platform's search engine to find the game they're looking for. **Publishers and developers can enter localized product names on STEAM in the General Application Settings of the Steamworks Settings section for their app[18].**

| Basic Info | Description | Ratings | Early Access | Graphical Assets | Trailers | Special Settings | Localization | Publish |

This area is where you configure the presentation of your product's page in the Steam store. Please complete all the fields marked as *. If you need help, check out the Store Page Best Practices documentation for a video walkthrough of configuring your store page.

App Type:* [Game ▾]

Game Name:* [Super Mega Epic Game]
This Game has localized names set, which will override the name set here in these languages:
Simplified Chinese: 超级恢宏史诗游戏
Traditional Chinese: 超級恢宏史詩遊戲
Edit localized names (Subject to limitations once through store review)

Steam.com

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18 "Localization and Languages", (retrieved Nov 27, 2023)

2.2.3 Chinese VO

While the decision to add Chinese subtitles should be a "no-brainer", some publishers might consider recording a full Chinese VO for their games. While it's **not entirely possible to calculate the impact of the VO on sales**, an increasing number of games, especially AAA titles, support Chinese VO on release (e.g., *Cyberpunk 2077* or *Dying Light 2*).

Opinions among industry insiders are divided: Brandy Wu, Overseas Business Developer at X.D. Network, stated in an interview with Chris Priestman that Chinese subtitles are a better choice, as Chinese players are used to listening to the original English or Japanese VO when playing a game. In contrast, according to Iain Garner, former Director of Global Developer Relations and Marketing at Another Indie, and Luis Wong of INDIENOVA, Chinese gamers appreciate the extra effort that went into preparing the Chinese VO. Most agree, however, that **well-prepared subtitles are a better choice than a poorly prepared VO**.

Since foreign companies rarely have proper Chinese voice talents, they often outsource the recordings to their partners in China. Therefore, in order to save resources, publishers can try **reaching out directly to Chinese recording studios**. The average price among credible recording studios in China varies between 70 to 100 CNY per recorder sentence.

2.2.4 Adaptation of game features

Localization refers not only to the translation of in-game texts, but also **adaptation of the game to the needs of the Chinese market**, e.g. by removing inaccessible features or adding local payment methods available only to Chinese players (in case of F2P titles). Without regular access to certain foreign websites and services, Chinese players might either miss out on particular game features, or even completely fail to run the game.

For example, any hyperlinks to the game's Facebook page or the studio's profile on Instagram will remain inaccessible to Chinese players. Similarly, any Google services, such as ads or CAPTCHA images, necessary to access certain features, will also be inaccessible. As a result, the game client might freeze not being able to connect to the Google server, which will most probably end up in a negative comment left by the Chinese player.

2.2.5 Localization for ISBN

Localization of the game is also an integral part of the ISBN application. In order to obtain an ISBN, a game cannot contain any foreign language texts, including text found on in-game textures, such as road signs, building names or signboards – all of those need to be translated into Chinese.

Games applying for an ISBN are also prohibited from using strong language, e.g., swear words, whether or not the developers consider it an integral part of the game lore. Some translators might have little experience with such localization, therefore publishers should consider leaving the task to their Chinese partners, who have adequate experience in tackling such problems.

However, it should be stressed that these rules apply ONLY to games distributed locally under an ISBN – sticking to the same rules when localizing games available through global platforms (i.e. STEAM, Epic, GOG) might backfire, as some players turn to global platforms to buy original versions of the products available globally, instead of the version available for purchase on local platforms.

2.3   STEP 3: Working with a publisher

Once your game has been localized into Chinese, your next step should depend on the revenue your company earns from the Chinese market on an annual basis. **Companies with little to no revenue (average under 80,000 USD annually) can minimalize their costs by entering into a partnership with a Chinese publisher.**

Contrary to Western countries, Chinese publishers rarely enter into a partnership early in a game's development. They prefer to sign games with a significant number of STEAM wishlists, focusing their efforts on promoting the game on the local market (promoting games locally does NOT require local distribution, as long as the games are available on global distribution platforms).

The Chinese publisher may take care of the game's localization into Simplified Chinese, register and manage the game's social media accounts (such as Bilibili or HeyBox), interact with your fanbase and reach out to media and influencers, though **they'll rarely invest their own funds in the game's development.** Their strength lays in their market expertise – to make the most of the market, marketing assets need to be localized, rather than translated, to better suite tastes of Chinese players and encourage them to buy the game.

In this respect, the Chinese publisher's role is more similar to that of Western PR agencies. The difference is that **the publisher undertakes all costs of local PR and promotional activities in return for RevShare (Revenue Share)**. Generally, **RevShare commission is 50% of the income generated by the Chinese market**, but can vary depending on particular projects.

However, since foreign companies find it hard to verify the credibility of their potential Chinese partners, it might be a good idea to "ask around" when approached by an unknown company. Many Chinese publishers, such as Tencent, NetEase, East2West Games, Whisper Games, Surefire.Games or Coconut Island, have partnered with Polish gamedev companies in the past, so you might want to ask for their experiences and opinion.

2.4   STEP 4: Employing an agency

Companies with an annual revenue from the Chinese market **above 80,000 USD**, can consider **employing a PR agency or a part-time Chinese employee** instead of partnering with a Chinese publisher. Usually, PR and promotional activities can increase a game's sales in China by at least 20%. Therefore, if the company already has significant revenue from the Chinese market, it seems viable to reinvest part of this revenue to further increase the sales.

Unfortunately, some global PR agencies combine high prices with little to no expertise on the Chinese market. Therefore, in order to make the most out of your budget, try to find agencies specialized in the promotion of PC/console games on the Chinese market, or reach out to local PR agencies in China. An increasing number of popular Chinese gaming websites offer agency services to overseas gamedev companies on fixed or flat fees, **ranging from 2,000 to 3,000 USD per month.**

2.5   STEP 5: Building your own team

When a company reaches the **final threshold of around 180.000 USD** in annual revenue from the Chinese market, it's about time to **start building a dedicated team** to coordinate and supervise all promotional efforts on the market. The **average salary of a Chinese native-speaker with sufficient experience in game promotion ranges from 20,000 to 30,000 CNY (about 2800 to 4200 USD).**

A Chinese employee can support and facilitate cooperation with your publisher/agency, unify and focus all messages reaching the Chinese community, as well as establish and maintain personal relations with media representatives and influencers, which are an invaluable asset in Chinese culture. They can also help organize local events, such as gameshows or press showcases. Beyond all, they'll play a pivotal role in establishing your company brand in China.

Part III – Reaching out
to your fanbase

Part III – Reaching out to your fanbase

Regardless of the choice of distribution platform, the local partner (publisher or agency) plays a pivotal role in promoting your game in China. Both because of limited understanding of the gaming market itself, and **because many local game promotion channels remain inaccessible to overseas companies**, requiring at least a basic knowledge of the Chinese language to register and post content.

However, thanks to Google Translate and the recent development of ChatGP and other similar services, **some goodwill and a lot of patience can take you a long way** – you can at least check Chinese social media for player sentiment, or even register your company's official accounts and start posting game trailers to begin building your presence in China before you're ready to invest resources into the process.

3.1   Chinese Game-oriented Social Media

When discussing Chinese social media, some people might mention WeChat or Weibo, which are considered the most popular social media in China. However, while having a WeChat account to talk to your potential partners won't hurt you (most Chinese people prefer to talk through WeChat than email), those aren't where you'll meet you fanbase.

> **Two most popular "social media" platforms among Chinese gamers are Bilibili and HeyBox.**

3.1.1 Bilibili (哔哩哔哩)

Bilibili (哔哩哔哩 or B站) is China's **leading anime, comics, and games (ACG) community** where people can create, watch and share engaging videos and livestreams, with **about 320 million MAU[19]**. Bilibili has also become one of the major Chinese over-the-top streaming platforms serving videos on demand, including documentaries, variety shows, and other original programming. In other words, it acts as a local substitute for YouTube and Twitch, which are both unavailable in China.

Bilibili is also known for its **bullet comments** ("bullet curtain", 弹幕) commenting system, where each added comment is displayed in real-time on the screen over the video.

Gamedev companies can **register an official account on Bilibili**, where you can post news about your games (in Chinese), add videos (including gameplays and trailers), gather followers and interact with other accounts, including fans and KOLs. While it's possible to engage in paid promotion of one's account, organic posts remain the best choice to grow your community.

3.1.2 HeyBox (小黑盒)

HeyBox is your go-to platform to immediately increase your presence on the Chinese gaming market. It's a smartphone app, which could be considered a **STEAM frontend in China**, allowing users to follow news about their favorite PC/console games, interact with others, and, most importantly, bind their HeyBox account with their STEAM Global account, which lets them add games directly to their wishlist and library.

According to official data, **88.9% of Chinese Internet users connect to the Internet via mobile devices[20]**, which means that even though your community might be heavily PC/console oriented, they'll still **view your marketing content on their smartphones rather than their computers.** Therefore, being able to read about a game and immediately follow and add it to your STEAM wishlist while on the bus or subway, is a huge improvement and invaluable convenience for Chinese players. **No wonder HeyBox has 10 million MAU!**

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[20] Meng Jing, "89% of Chinese Internet users use smartphone to go online" (retrieved Nov 27, 2023)

The app notifies users of sales and discounts, also acting as a **STEAM key distribution channel. Companies can also register an official HeyBox account** and **post news and information about their games**. It should be noted however, that while companies can gather followers under their official account, most HeyBox users rarely check their personal feed, instead focusing on news appearing in the main feed. Therefore, posts without engaging or interesting content (e.g., minor updates or patch info) are **less likely to get good exposure**.

3.2 Good marketing practices

Although Chinese and Western gamers may differ in terms of preferred game genres, aesthetics or gameplay models, their expectations towards marketing assets are quite similar – **they have to be engaging and interesting**. However, **not everything that will engage a gamer from Europe or the US will be equally interesting to a Chinese gamer**. Therefore, it's worth considering what to avoid when preparing marketing assets to make sure they will appeal to your Chinese audience and won't get you into trouble.

3.2.1 Content localization

Although some gamers consider English "fashionable", a vast majority of your followers won't be able to understand content in English, which means **all posts, images and videos need to be localized into Simplified Chinese**. Language is merely the first barrier, though, as the content itself needs to be localized to have the desired impact.

For example, many Chinese gamers are high school and university students, who can't afford high-end gaming PCs and laptops. Therefore, mentioning that your games have widescreen support, ray tracing and high end graphics might not be the way to go. Similarly, since most players cannot access Discord in China, inviting your followers to participate in a Discord event or contest might backfire, as without access to Discord they'll feel left out.

Additionally, **all content posted on Chinese social media needs to comply with local laws and regulations**. While it's possible to post content about games without an ISBN, all public marketing assets need to adhere to the same rules, meaning they cannot portray or include brutality, nudity or politically sensitive topics. Insistent posting of content violating such regulations will probably result in a permanent ban on your account.

3.2.2 Fonts and sizes

As already mentioned, **88.9% of Chinese Internet users connect to the Internet via mobile devices**[21], which means that all the content you post on your Chinese social media channels must be easily readable on a smartphone screen. Additionally, since Chinese characters are more complicated than letters in the Latin alphabet, all texts and subtitles should be generally bigger than their English version.

As a rule of thumb, **Chinese subtitles should be 15%-20% bigger than English subtitles** in video content (depending on the font you choose), and should be added regardless of whether the video has an English VO or Chinese one. That's because some people in China prefer to use local dialects in their day to day communication, therefore it might be easier for them to understand the subtitles than the VO.

You should also **choose a good, FREE and easily readable Chinese font**. As preparation of a Chinese font requires handwriting of several thousand Chinese characters, prices for commercial use of fonts can range from several to several thousand dollars!

Costs of commercial fonts are so high, that there are specialized companies browsing the internet in search of unlicensed use of commercial fonts. If you happen to use such a font without the proper license in your marketing assets, whether it's an image or a game trailer, you risk a legal dispute and huge costs. Therefore, it is worth making sure that the font you use is definitely free and indeed Chinese (rather than e.g., Japanese). Among others, the SOURCEHAN_CN font is one worth recommending.

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[21] Meng Jing, "89% of Chinese Internet users use smartphone to go online" (retrieved Nov 27, 2023)

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3.2.3 Game trailers

If you want to make sure the trailer you post on social media is successful, you should avoid the following mistakes when preparing the trailer content:

- **The trailer doesn't say clearly what the game is about** - in China everything happens fast and few people have time to think about everything indefinitely. When watching a trailer for a new title they know nothing about, players expect detailed and straight-forward information about what they can expect from the game. If the trailer attempts to be overly mysterious or only teases the content of the game, it is unlikely to arouse interest among Chinese viewers;

- **You go over the top** – it's often the case that the more we want to show the more we don't know what the trailer is about. It's a good idea to identify the game's key elements (known as 亮点) that will differentiate your title from the competition, and focus on showing and promoting those elements;

- **The trailer focuses on facts, not "experiences"** - in China, it's common to talk about games in context of experiences, or yóuxì tǐyàn (游戏体验). When preparing a trailer, try to think whether you can use it to convey the same sensations and emotions the players will experience when they enter the game world.

3.2.4 Useful expressions

ENGLISH	SIMPLIFIED CHINESE
Coming soon!	敬请期待!
Available on:	现已登陆:
Wishlist and follow on Steam	添加到你的STEAM愿望单并关注我们
Wishlist now on Steam	添加到你的STEAM愿望单
Check out our website:	查看我们的官网:
Coming soon to PC	即将登陆PC
Coming soon to PC and Consoles	即将登陆PC和主机
Coming to PC on May 25	5月25日将登陆PC
Coming to PC and Consoles on May 25	5月25日将登陆PC和主机
Out now!	现已发售!
Play with friends!	和朋友一起来吧!
Release date: TBA	发售日待定

stock.adobe.com / 732719055

03.

3.3 An inconclusive list of Chinese Gaming Media

Similarly to overseas outlets, **Chinese gaming media are gradually losing their domination in favor of a growing number of influencers and KOLs**. However, as many influencers are actually whole teams that manage their channels and prepare the content, the border between traditional gaming media and influencers blurs even further.

The most influential traditional media outlets in China include **IGN China** (www.ign.com.cn), **Sina Games** (games.sina.com.cn), **3DMGAME** (www.3dmgame.com), **VGN** (www.vgn.cn), **ALi213** (www.ali213.net), **YYTS** (www.yystv.cn), **G-CORES** (www.gcores.com), **Keylol** (keylol.com) as well as popular Weibo accounts such as **@中国鉴赏家同好会**, **@steam情报局**, **@BB姬Stu-** dio, **@玩STEAM的大魔王**, **@STEAM打折情报** and **@二柄APP**. Quite often it's not the media websites themselves that are popular with players – it can be either their Bilibili or Weibo accounts, their individual apps or even livestreaming channels.

Among the various media outlets, one that's worth a particular mention is **Ultra Console Game** (**游戏机实用技术**, **commonly known as UCG), which is currently the only printed magazine dedicated to PC/console games in Mainland China**. The magazine was founded in 1998, and was dedicated to reporting on video games and console games, focusing mainly on home consoles, handheld game consoles and respective games.

3.4 A short guide to KOLs

Influencers (or KOLs) and livestreamers play an increasingly crucial role in the promotion of games in China. However, since Twitch and YouTube are unavailable in the country, streamers use local streaming platforms, including Bilibili (哔哩哔哩), Douyu (斗鱼), Huya (虎牙直播) and Douyin (抖音) to post and stream videos.

Developers interested in cooperating with Chinese KOLs should have in mind though, that **not all games are appropriate for content creation and livestreaming**. All content needs to be in accordance with local regulations, which means that games including sensitive content such as brutality, nudity or political topics won't be suitable for such cooperation.

Additionally, many Chinese KOLs **cooperate exclusively on a commercial basis**, meaning you need to pay for any livestream or content they create and post on their channels. Most popular KOLs, those with over 1 million followers, price such cooperation at tens and even hundreds of thousands of dollars per stream/video. You can, of course, just send them a code to your game, hoping they'll create and upload content for free, but chances they'll be willing to do it are rather slim.

Smaller and more specialized KOLs are more willing to cooperate with game developers for free, as long as they're interested in your titles. What is more, **such cooperation often achieves better results**, as most of their followers are interested in the games they stream rather than the influencers themselves, which is often the case with the most popular KOLs. Therefore, a livestream by a KOL with 100k followers, specializing in strategy games, can get you more wishlists that a livestream by a KOL with 1 million followers, who watch them not for the content they provide but to see the person behind the stream.
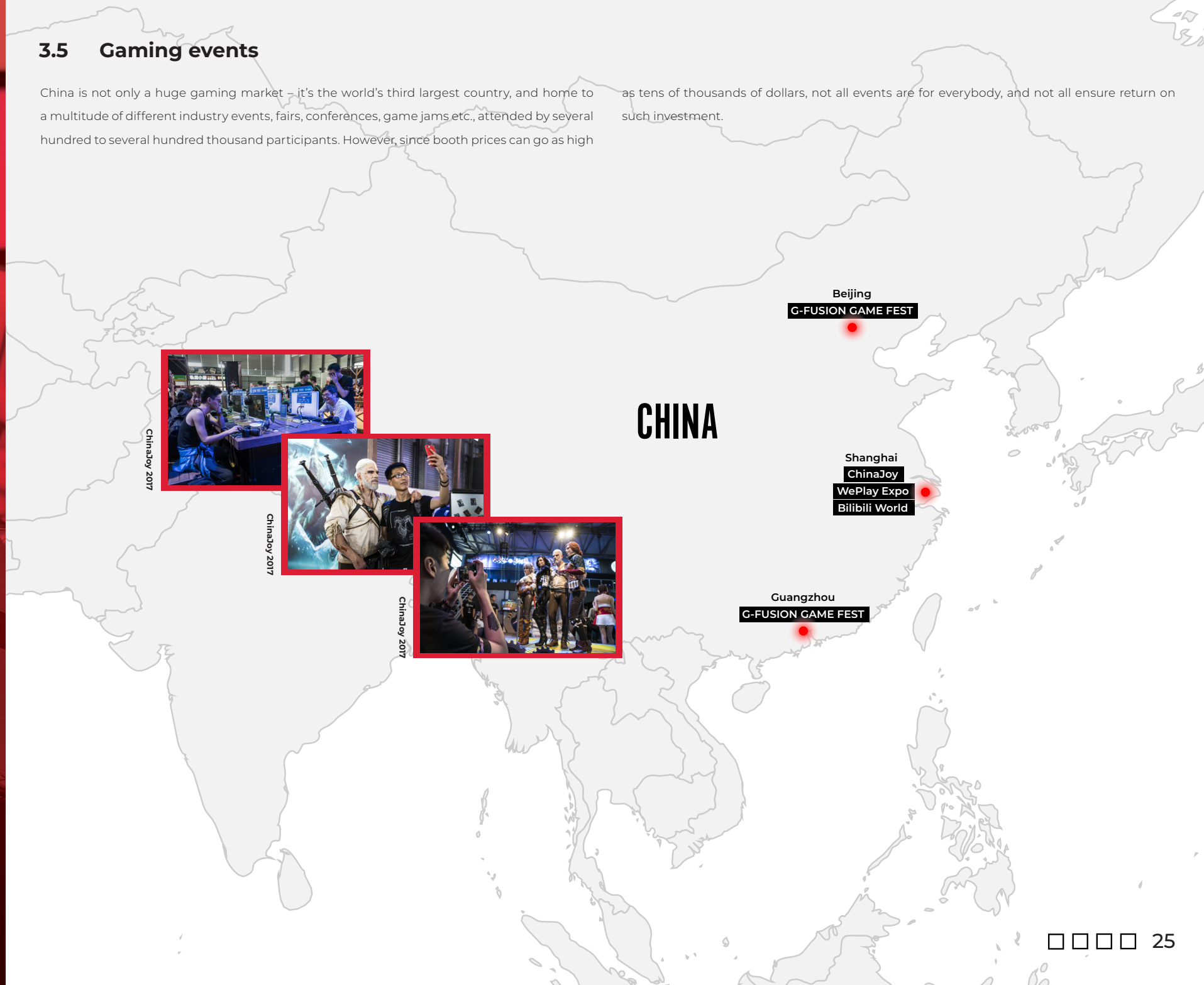
What's important to note, however, is that **Chinese livestreaming platforms DO NOT display the number of viewers for their streams** – what they display is called a **"popularity value" (人气值),** which is the product of the number of viewers, comments and gifts that the streamers receive from their viewers. In other words, a livestream with o popularity value of 1,000,000, can have as little as 50,000 actual viewers.

03.

3.5   Gaming events

China is not only a huge gaming market – it's the world's third largest country, and home to a multitude of different industry events, fairs, conferences, game jams etc., attended by several hundred to several hundred thousand participants. However, since booth prices can go as high as tens of thousands of dollars, not all events are for everybody, and not all ensure return on such investment.

ChinaJoy 2017

ChinaJoy 2017

ChinaJoy 2017

CHINA

Beijing
G-FUSION GAME FEST

Shanghai
ChinaJoy
WePlay Expo
Bilibili World

Guangzhou
G-FUSION GAME FEST

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3.5.1 Game shows

Organized by Howell Expo (上海汉威信恒展览有限公司), **ChinaJoy is the largest video game trade show in China**. The event is held annually in late July/early August in Shanghai, gathering hundreds of thousands of visitors in the B2C zone, and tens of thousands of industry professionals in the B2B zone. The high numbers unfortunately translate to high prices - renting exhibition space at ChinaJoy is very expensive, and only games with an ISBN are allowed to enter the B2C zone of the show.

ChinaJoy is a good opportunity to meet people and network with representatives of the Chinese gaming industry, including publishers, distributors, media agencies or representatives of Chinese gaming media. However, since a booth on ChinaJoy might have little to no impact on sales, indie game developers should probably consider attending the event without a booth, to reach out to potential partners without incurring additional costs.

Shanghai is also home to **Bilibili World**, which is considered the "ultimate event" for anime and game enthusiasts. Since Bilibili is China's leading anime, comics, and games community, the event attracts over 200.00 attendees every year, and receives very good exposure both on Bilibili itself, as well as other media channels, including coverage by Shanghai Television and TV Tokyo and dozens of Chinese gaming media.

WePlay Expo (WePlay文化展) is a smaller B2C event organized in November in Shanghai by China indie Game Alliance (中国独立游戏联盟, or CiGA, for short). Although large companies such as Ubisoft or Cube Game also attend the event, the show focuses mainly on indie games. A local Game Developer Conference is held during the fair, and annual awards are given to indie game developers during the China indie Game Award Ceremony. Thanks to a cooperation agreement between CiGA and Indie games Poland Foundation, a limited number of Polish gamedev studios can attend the even every year free of charge.

Last, but not least, there's **G-FUSION GAME FEST**. The event is organized by GAMECORES (机核网, or G-CORES, for short), one of China's most popular gaming websites, and is especially popular with "hardcore" gamers. The fair is usually held every year in May in Beijing and in Autumn in Guangzhou, attracting tens of thousands of players with each edition.

3.5.2 Conferences

Gaming conferences are an excellent source of information on the latest market trends and new regulations, as well as a great opportunity to meet industry experts. However, most conferences are held in Chinese, often without translation into foreign languages.

The China Game Industry Annual Conference (中国游戏产业年会, or GIAC), organized at the end of every year, is the most important gaming conference in China, co-organized by the National Press and Publication Administration and CGIGC. During the conference, organizers reveal the annual China Game Industry Report, often cited throughout this guide.

The second key conference is the Howell Expo's China Digital Entertainment Conference (中国国际数字娱乐产业大会, or CDEC), organized annually during the ChinaJoy game expo. The conference is attended by industry experts from home and abroad and always provides attendees with simultaneous interpreting into Chinese and English.

04.

Part IV – Summary

04.

Part IV – Summary

Many Polish game developers still consider the Chinese gaming market distant and exotic, however, being the largest gaming market in the world, it offers a wide range of opportunities. Just like every other regional market, the Chinese gaming market, too, possesses its own unique features, and takes time and energy to master.

Successful endeavors of many Polish gamedev companies and the huge popularity of games such as *Cyberpunk 2077*, *Frostpunk*, *Ruiner*, or *Starforce*, are proof that there is a place for Polish games on the Chinese market. However, success requires a large dose of patience and great caution on the part of Polish companies, and above all a conscious and sensible approach to the subject.

Before taking a full leap, companies should first familiarize themselves with unique features of the market and properly assess their own products, to make sure they make the best of their opportunities and minimalize their risks.

They should also bear in mind their endeavors are supported by a network of institutions, including the Ministry of Culture and National Heritage, Ministry of Foreign Affairs, Polish Institute in Beijing, Polish Investment and Trade Agency, Centre for the Development of Creative Industries and the Indie Games Poland Foundation, that do their best to provide them with the chances they need to start their expansion to the Chinese market.

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About the Author

About the Author

Damian Jaskowski is a Chinese gaming market expert working as Expert PR Manager for East Asia at 11 bit studios and Chinese Market Coordinator at the Indie Games Poland Foundation.

Damian began his research of the Chinese gaming market in 2016, when he joined the Polish Institute in Beijing. Acting as the Institute's Creative Industry Expert, Damian established relations with numerous representatives of the Chinese gamedev community.

Thanks to his insight and expertise in the Chinese gaming market and gamedev industry, Damian was tasked with writing the first version of the Chinese Game Market Report, issued by the Polish Institute in cooperation with the Indie Games Poland Foundation in 2018. The report became an invaluable and reliable source of information on the Chinese market for many Polish companies.

Since both the Polish and Chinese gamedev industries and gaming markets have gone through significant changes over the course of the past five years, Damian was again tasked with compiling an updated version of the report to give Polish institutions and game developers an even better understanding of the recent developments on the Chinese market, and better prepare them for the journey across the Great Wall they're about to embark on.

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