



# Key games markets in Asia

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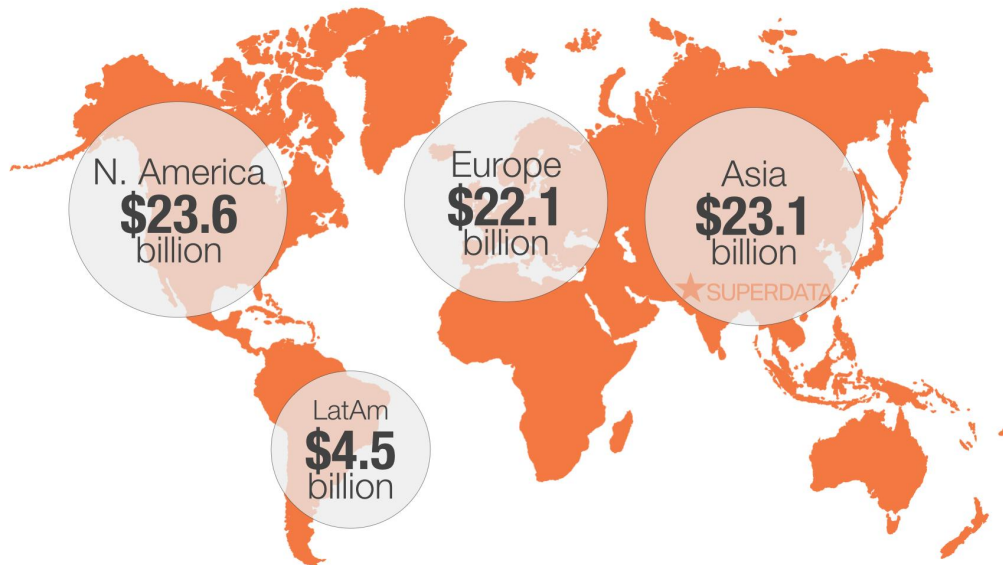


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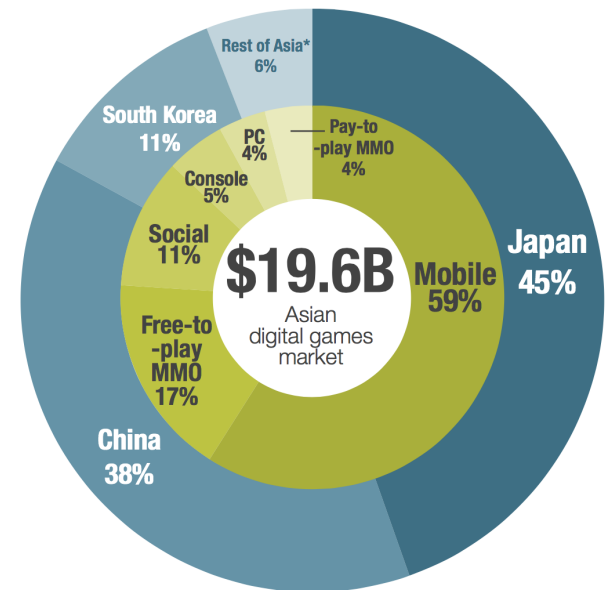
- Asian markets in context
- Key platforms per country
- Japanese mobile market
- Chinese mobile market
- Korean mobile market
- Some advice

# Asian markets in context

Global games market,  
by region (2015E, billion \$)



Asia digital games market share  
by country and gaming segment, 2015E





# Asian markets in context (II)

## What Japan, China and Korea have in common

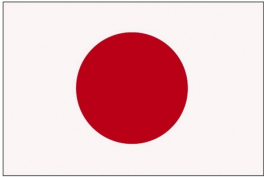











- Strong local developers & publishers, focused on their own market
- Mobile as primary gaming platform (particularly Android)
- Players do NOT play games in English
- 4 is the bad-luck number
- Low iPad/tablet penetration

## What they do NOT have in common

- Language and culture
- Art style
- Gaming tradition
- Top games and publishers
- Ecosystem (devices, stores, payment methods...)
- Pretty much everything else!



# Key platforms per country

	Mobile	PC	Console
			
			
			

# Japanese mobile market



- Absolutely mainstream, supported by years of TV ads
- Highest ARPU market
- Dominated by local publishers (though with a recent push by top Western-developed games)
- Massive Android market, with similar monetization to iOS. Much of it outside Google Play, and with devices by local OEMs (Sony, Toshiba, Sharp, Panasonic...)
- iPhone has decent market share, though lower than in US & Europe. Low iPad penetration
- Revenue distribution much more skewed towards the top titles, compared to US
- LINE messenger is a critical distribution platform for casual games
- Prevalence of games with sophisticated CCG-based monetization and very frequent time-limited events

Grossing		
§	モンスターストライク mixi, Inc	=
§	パズル&ドラゴンズ GungHo Online Entertainment, ...	=
§	LINE : ディズニー ツムツム LINE Corporation	=
§	実況パワフルプロ野球 KONAMI	▲3
§	クイズRPG 魔法使いと黒猫の... COLOPL, Inc.	▲1
§	ジョジョの奇妙な冒険 スター... BANDAI NAMCO Entertainmen...	▼2
§	白猫プロジェクト COLOPL, Inc.	▼2
§	剣と魔法のログレス いにしえ... Marvelous Inc.	=
§	戦国炎舞 -KIZNA- 【人気の本... Sumzap Inc.	▲7
§	LINE PokoPoko LINE Corporation	▼1

Top grossing iPhone games  
Japan, 22 June 2015



# Chinese mobile market



- Heavily Android dominated, with massive fragmentation of devices (Samsung, Xiaomi, etc.)
- Massive fragmentation of distribution channels and payment methods in Android
- Growing iPhone market share, though still small. Low iPad penetration
- WeChat messenger is a critical distribution platform for games
- Massive piracy!!

Grossing		
[S]	梦幻西游-2015国民手游 人人都... 网易移动游戏	=
[S]	全民突击-全球第一真人实时对... Shenzhen Tencent Computer ...	=
[S]	全民奇迹-MU (君临天下) Liu Huicheng	▲1
[S]	刀塔传奇--亿万玩家实时PK 跨... 龙图游戏	▲1
[S]	神武-西游回合 快乐交友 Hero Network	▲1
[S]	天天爱消除 Shenzhen Tencent Computer ...	▲1
[S]	全民飞机大战 Shenzhen Tencent Computer ...	▼4
[S]	开心消消乐 乐元互动(北京)游戏技术有限公司	=
[S]	三国之刃 Tencent Technology (Shenzhe...	▲1
[S]	天天酷跑--全球最多人在玩的... Shenzhen Tencent Computer ...	▼1

Top grossing iPhone games  
China, 22 June 2015







# Korean mobile market



- Heavily Android dominated, primarily by Samsung & LG devices
- Low iPhone and iPad penetration
- Significant Android distribution outside Google Play
- Kakao messenger is a critical distribution platform for ALL game genres, not just casual
- Highest 4G and broadband speeds (and because of that, players are used to ZERO lag, so use local servers!)
- Competitive PvP and e-Sports are massively popular
- More receptive to foreign developers than China or Japan

Grossing		
₩	레이븐 with NAVER Netmarble Games	=
₩	뮤오리진 Webzen Inc.	=
₩	Clash of Clans Supercell	=
₩	세븐나이츠 for Kakao Netmarble Games	=
₩	모두의마블 for Kakao Netmarble Games	=
₩	애니팡2 for Kakao SUNDAYTOZ, INC	=
₩	몬스터 길들이기 for Kakao Netmarble Games	=
₩	God of Highschool YD Online	=
₩	Hearthstone Heroes of Warcraft Blizzard Entertainment, Inc.	=
₩	Candy Crush Soda Saga King	=

Top grossing Android games  
South Korea, 22 June 2015







# Some advice

- To have a chance in each of these markets, be prepared to localize and heavily customize your game (including customer support, live operations, servers...)
- Work with a local partner if possible (probably a different one in each country)
- Be ready to fail (especially in China!!)

# Q&A

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