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PUBLISHING MOBILE APPLICATIONS IN CHINA

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ABSTRACT

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The purpose of this thesis was to gather general information of China's mobile market from Western small and medium business perspective. The research is made for a small mobile development company, BelleGames, to help them understand better the Chinese mobile market and its unique aspects before making the market entry decision. However, the research questions of the thesis were designed so that also other small and medium businesses could relate on them.

This thesis consists of three parts. The first part exams the general information of mobile market and application behavior, while the second part focuses on the special features of Chinese culture and legislations. The third part is more specific guide for mobile application developers to localize and publish their application for China's market. The data was collected from several online article and seminar.

The main conclusions of the study supports the assertion that all the applications published in China needs to be localized in a minimum scale for application to be somewhat successful. Also the publishing chain is more complex, especially for Android platform which has hundreds of publishing platforms to offer as Google Play offers only totally free applications. On top of that the Western companies cannot practice in China without a partner, which brings both pros and cons for the developer.

Keywords:

China, Chinese, Mobile, Application, Game, Market, Publish

Table of Contents

ABSTRACT.....	3
1. INTRODUCTION	6
2. CHINA'S MOBILE MARKET IN GENERAL.....	8
2.1. Mobile Device Market	8
2.2. Mobile Application Behavior	10
3. SPECIAL FEATURES OF THE CHINA MARKET	14
3.1. Business Culture and Guanxi	14
3.2. Laws and Regulations	16
3.2.1. Intellectual Property Rights	16
3.2.2. Internet Policy	17
3.2.3. Regulations for Games.....	18
3.3. Piracy.....	18
4. PUBLISHING APPLICATIONS IN CHINA.....	21
4.1. Publishers.....	22
4.2. Localization.....	24
4.3. Distribution.....	27
4.3.1. Apple and Microsoft App Stores.....	27
4.3.2. 3 rd Market	27
4.3.4 Pre-Installations.....	29
4.4. Pricing.....	30
4.4.1. Free-to-Play	30
4.4.2. Payments	32
4.5. In-App Ads.....	33
5. CASE FINGERSOFT	35
6. CONCLUSIONS.....	37

7. DISCUSSION.....	39
REFERENCES	41
APPENDICES.....	51

1. INTRODUCTION

Chinas' smartphone industry is blooming, and the number of mobile application activations and engagements for Android and iOS have exceeded the USA figures. Even though the mobile gaming in China is predicted to be worth 3.6 billion USD by end of 2017, it is still considered one of the toughest markets due corruption, competition and slow-paced negotiations. (Hanage 2013, cited 02.09.2014.) Regardless of this cold truth of slow process, but it is still possible for a Western mobile application companies to succeed in this market. However, they are still uncertain what these massive markets can actually offer for them and in what kind of efforts. Even if they decide not to publish their applications in China, they might already be there.

Many of the developers may think that there are no rules in China, mostly because of the IP thefts (Tu 2013, cited 07.05.2015). In fact, there are many policies and regulations from internet accessibility to restrictions for game content, e.g. Facebook is not allowed or any game that consists of racial or ethical hatred will be banned. Even though these regulations are important, they might be the figures where developers give less attention to, if publishing for Android; Finding the right partner and getting on with all the localization features – not forgetting all the monetizing issues – consumes the most time before getting the application published in China.

This paper concentrates on gathering relevant information on China's mobile application markets and the essential key points to focus on when a foreign company wants to publish their mobile application in China. Although mobile applications and games have already been published in China for some time and there is a lot of interest, there are not many scientific literature written on the topic yet, even though there are guides and data scattered all over the web.

This thesis was contributed by BelleGames Ltd, a small mobile game studio, which develops casual games in retro style and gamified health care solutions for GASEL-project (Gamified Services for Elderly) for Windows and Android operated mobile devices. The company created a game which they were planning to bring to China, but they did not have deep knowledge of the markets or its functionality. Since BelleGames works closely with students and other application developers, the company thought it would be essential to also deal with iOS devices in this thesis.

As the main focus of the thesis is on mobile games, most of the contents are also suited for other applications. The research questions answered are formed so that also other mobile application developers may relate into them:

- How can a small game developer or company access to Chinese mobile application markets within the laws and regulations?
- What are the most used app stores and how developers can apply their applications in there?
- How to make revenue with Free-to-Play games?

In addition to these questions, this thesis also has general information of the smartphone market, to get a sneak peak of the market trends and behavior. There is also a short introduction to the Chinese business culture, in case of developers have to negotiate with the Chinese publishers and channels.

The research was gathered from several already written documents and researches. There are several guides and articles already written out of the topic, but they rarely scratch deeper than the surface. However, as I have already seen during the research, the information of mobile application markets gets old quickly, which makes also this thesis outdated really soon. Also most of the sources used for this research are nearly solely found from online because of lack of written literature, which might cause unreliability for some information.

2. CHINA'S MOBILE MARKET IN GENERAL

China has the largest population and the fastest growing consumer markets in the world which makes it very attractive for foreign companies to export their products and services. One of the fastest growing market has been the smartphone and mobile game market. During 2013, the volume of active smartphone users grew from 191 million to 700 million (TalkingData 2014a, cited 12.03.2015). The great demand has lowered the prices, but also increased the market penetration, in particularly the local brands (Shu 2014).

2.1. Mobile Device Market

In 2014, around 70% of the Chinese consumers used smartphone and 60% used tablets (Accenture 2014, cited 12.03.2015). The most bought brand of the smartphone market was the local Xiaomi, followed by Samsung with only 0.6% difference in sales (Newzoo 2015, cited 11.05.2015). In Figure 1, there can be seen that local brands has started to gain more footage in China's market, even though the famous international brands are still strong. Nevertheless, the smartphone markets are very fragmented when looking the market shares of device models of Android operating system (OS) in 2013 as seen in Figure 2. The market penetration of the smartphone operating systems is primarily divided between Android with and Apples' iOS. (Cui 2014.) During 2014, Android dominated the markets with over 75% shares, iOS with around 20%. Only 0,7% of the volume of active smartphones are Microsoft Windows Phones. (Statista 2015b, cited 12.02.2015.)

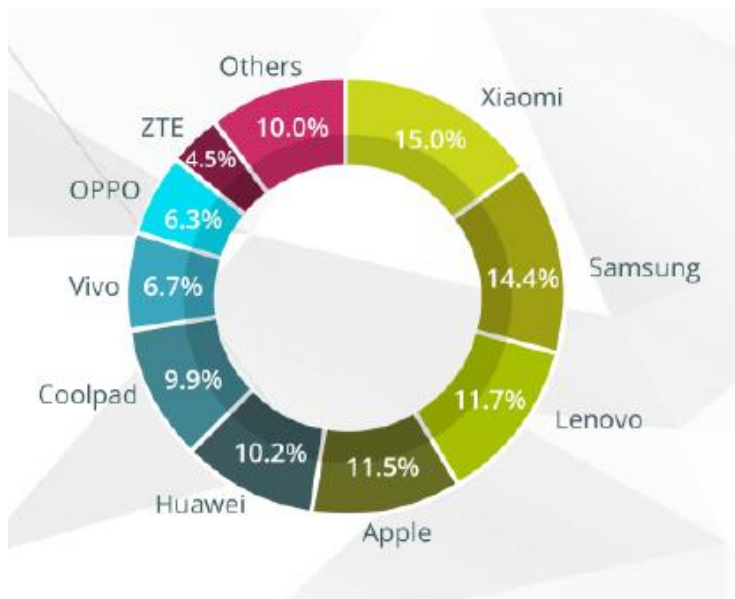


FIGURE 1. Market Share by Brand in 2014 (units), formed by using IHS, 2014 China Smart Phone Sales Ranking List (Newzoo 2015, date of retrieval 11.05.2015)

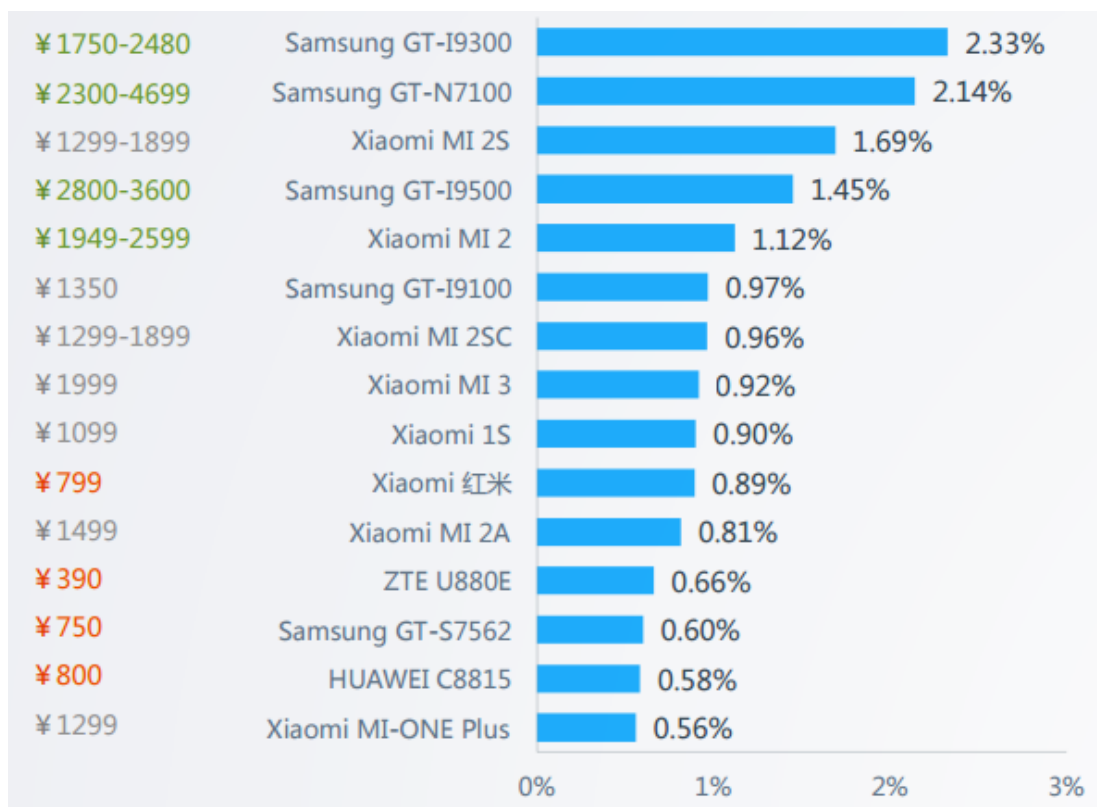


FIGURE 2. Top active Android device in China in 2013. (Cui 2014, date of retrieval 12.03.2015)

According to Accenture China Consumer Insight (2014, 16) consumers from big metropolises, such as Beijing or Shanghai, they prefer more expensive mobile phone brands than those in other urban

areas. Most of the brands cost around 2,000 Chinese yuan (CNY) when the prices vary from 1,000 – 4,000 CNY. Majority of the domestic brands are 1,000 CNY or less, with exception of Huawei and Xiaomi. Accenture's survey also shows that people tend to switch the cheaper mobile phone brands more frequently while expensive brands are used for longer periods. According to TalkingData websites, the most favorite brand in the end of January 2015 was Apple with 32% coverage, followed by Samsung with 15% coverage (2015, cited 14.03.2015).

China has only three mobile carriers: China Mobile is the largest operator in the world by 726.3 million subscribers and 90.4 billion USD revenues. Other mobile carriers are China Unicom and China Telecom, which both altogether have over 1.2 billion subscribers with 448.3 million of 3G users. (mobiForge 2014, cited 18.03.2015.) The 4G connection is only available in big cities, such as Beijing and Shanghai, which means that users have only access in limited cellular work or slow Wi-Fi connections (Jordan 2014, cited 04.05.2015). Also the data plans of the mobile carriers are expensive, i.e. downloading 30 MB files may cost 5 CNY (0,81 USD) and 70 MB 10 CNY which is already 1,61 USD (MyGamez 2015, 20).

2.2. Mobile Application Behavior

In average Chinese active smartphone there is installed 24 applications, of which a quarter are usually games (TalkingData 2014b, cited 12.03.2015). Just the same, it seems that smart devices are becoming more entertainment-oriented, i.e. as seen in Figure 3 games, video and music applications are the most used functions in smart phones and tablets. Mobile devices have changed consumers' way to use their time by offering various entertainment, social and information applications. Especially the socializing functions, such as WeChat which is known as Weixin in China, are gaining even more popularity. (Accenture 2014; 10, 16.)

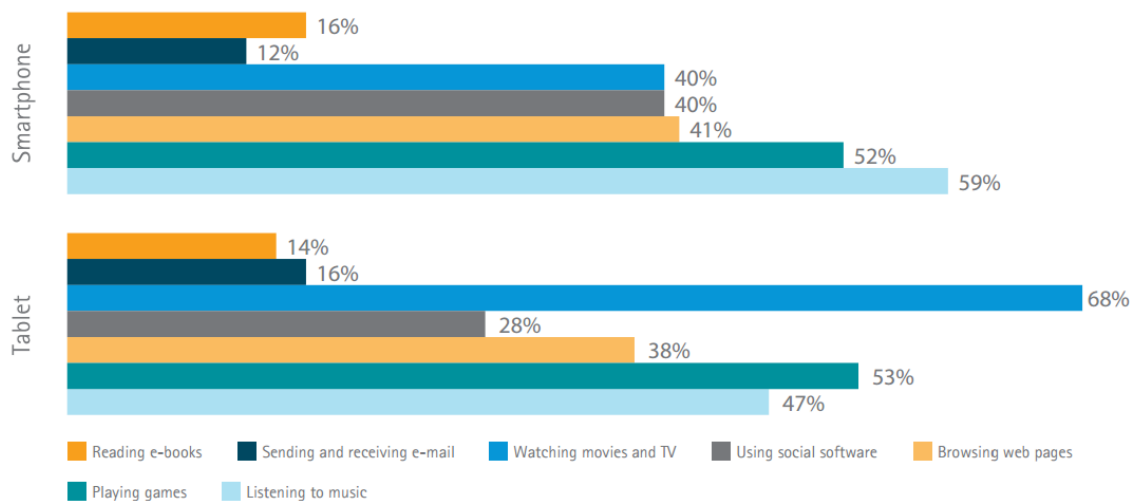


FIGURE 3. Mobile device functional application usage in percent's. (Accenture 2014, date of retrieval 12.03.2015)

WeChat is one of the most used instant messaging mobile application in China. It was first released by name Weixin (微信) in 2011 by Chinese corporation, Tencent, and the application allows users to send voice messages, change contact information, share photos, etc. (Tango 2014, cited 13.03.2015.) In 2013, Tencent published WeChat gaming center, where users can play supported social games via WeChat account and share scores or challenge their friends inside the app (Millward 2013a, cited 13.03.2015). By August 2014, WeChat had 438 million active users and Tencent online game revenue reached CNY 11.1 billion when it got integrated with company's other chat platform, QQ (Ferguson 2014, cited 13.03.2015).

In 2013 the player volume in China was 450 million, including PC, console and mobile game players. The total volume of game markets in 2013 was 13.5 billion USD, of which 1.8 billion USD came from mobile games. (Fiden 2014.) People spending money on mobile gaming has increased five times in 2013, showing that more and more people would like to pay for them (TalkingData 2014b, cited 12.03.2015). By 2014, the mobile game market is evaluated to be over 3 billion USD, which is almost double from the previous year (Statista 2015a, cited 12.02.2015). Around 40% of mobile game players play primarily casual games, which is also the genre the players are mostly spend their money on. 31% of the mobile game players are keen on card and board games, even though people are being fastidious to spend on them. On card battles however, Chinese people are spending more money than on card and board genre, while only 11% of the total players are considering it as their primary mobile game genre. (TalkingData 2014b, cited 12.03.2015.)

Nevertheless, card battle games, puzzles and action games altogether are bringing over the half of the Android game industry revenues (Fiden 2014).

TalkingData has research that nearly 30% of Chinese players install 6-10 mobile games in a month which can be seen in Figure 4, while almost 39% installs over 10 games and 32% five or less. Most of these new installs are getting placed during the weekend, from Fridays to Sundays, which can be taken into consideration when doing marketing or advertising strategy. When releasing an update for a game, around 62% installs the update within 2 days, while 30% won't update the game at all. Still, Chinese play games in average 32 minutes per day. (TalkingData 2014b, cited 12.03.2015.)

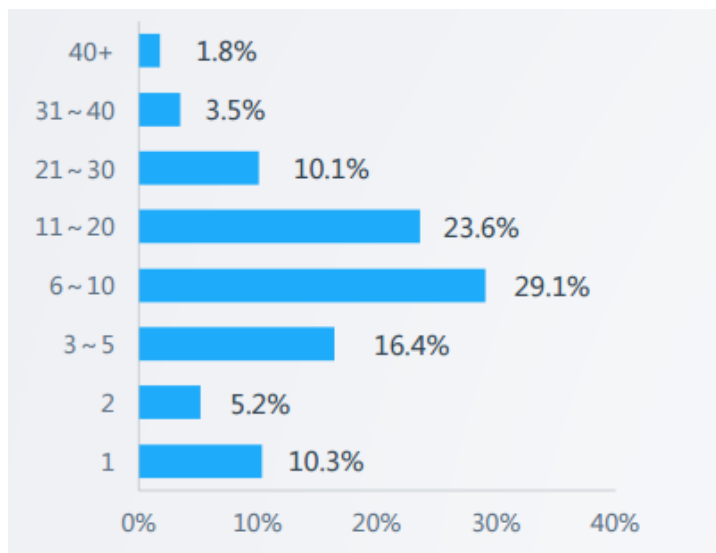


FIGURE 4. Player distribution data based on game installation receipts in December (TalkData 2014b, date of retrieval 12.03.2015)

As the mobile devices are more adopted in China, also the mobile advertisement is expected to grow as well. Chinese consumers click more than twice as many ads than citizens of UK or USA and only 7% of them don't like targeted ads (Jaffer 2015, cited 24.05.2015). Media agency OMD made a poll for 440 Chinese mobile consumers from 7 different cities in 2014, of which 94% of them thought that mobile advertising was necessary, but surprisingly 89% thought that they were annoying as well. 66% still thought that mobile ads were being also interesting (Boxall 2015, cited 24.05.2015). Anyhow, as Figure 5 portrays, 40% of the users intentionally clicks mobile ads intentionally, of which a half actually interact with the brand. Most preferred format of the ads are videos and mobile coupons. (PwC 2014, cited 24.05.2015.)

Mobile ad clicks	China (%)
Likelihood to click on ad if content is more relevant	78 yes 22 no
Past month nature of mobile ad clicks	
Did not click on ad	34
Clicked intentionally and interacted with brand	20
Clicked intentionally and did not interact with brand	20
Clicked accidentally	26

FIGURE 5. Chinese Consumer's Behavior towards Mobile Ads. (PwC 2014, date of retrieval 24.05.2015)

When receiving in-app ads, consumers expect them to be useful, relevant to them and delivered at the "right time". Especially targeted ads are desired by the consumers and nearly half of smartphone users want to receive them daily, 34% by weekly. The most acceptable targeting criteria is by interest as seen in Figure 6. (PwC 2014, cited 24.05.2015.)

Acceptable mobile advertising targeting criteria	China (%)
By interests	76
By online purchase history	50
By current location	40
Types of sites visited on mobile phone	36
Types of sites visited on PC or tablet	30
By previous offline purchase history	20
By route to work	18
By keywords used in your email	16
By keywords used your texts	14
By your name	14
By keywords used in your phone calls	12

FIGURE 6. Acceptable Mobile Advertising Targeting Criteria by Chinese Consumers. (PwC 2014, date of retrieval 24.05.2015)

3. SPECIAL FEATURES OF THE CHINA MARKET

The Chinese way of doing business differs a lot from westerns; negotiations are time-consuming, the pressure on preserving the dignity of the counterparty, Guanxi and fighting against the corruption are everyday life in Chinese business culture. Still, many statement made from China can be challenged by saying that it does not apply for certain territory and in its subculture. However, before entering in Chinese markets it is good to have some general knowledge of their way of doing business and laws and regulations. (Pietarinen 2010; 9-11, 90-91.)

3.1. Business Culture and Guanxi

Chinese business culture is usually described as “high-context”. This refers to Chinese way to communicate with few words and relay their message to the counterparty through behavior, expressions or objects which all might have their own symbolic meaning. It is also important to maintain harmony in any situation. Anger or public humiliation can be seen the same as the loss of face, or in other words, respect and reputation. (Pietarinen 2010; 49, 52, 54.)

It is good to know that Chinese employees are more loyal to people, as their group or superior than to the company itself. The Chinese society does not courage to individual creativity or spontaneity, in matter of fact individualism is considered as a selfish act for personal gain. Therefore they act more in groups and expect to receive orders from the leader, who also makes the most important decisions in the company. Since Chinese are not used to, and sometimes even don't want to use democratic decisions, notifying their hierarchy is important: Individual is secondary to a group, minority is secondary to majority, and employees are always subordinates to their superiors. It is important to know own hierarchical position as well as others. This hierarchy is also seen in negotiations and should be taken into consideration before entering one. This can be seen from titles and name orders in lists or in handshakes: The person in highest position is always first, followed by second in charge and so on. (Pietarinen 2010; 53-54, 70, 100.)

Patience is an essential feature when negotiating with Chinese; they may return, time to time, to negotiate with already handled subject with no reason. Regardless of that, the main focus of the negotiations is in the process, not in results. Chinese always aim for the long-term relationship and mutual benefit before making out business, which may result as many compromises from both

sides in the final contract. Even the first meeting with the negotiating party is usually to get know each other, not talking about the business. Nonetheless, it is advised to write down of all given concessions and make sure to not give those too many without reciprocity. Also unlike the common belief, it is allowed to say no to some of their suggestions. (Pietarinen 2010, 93-97.)

Business cards are given in almost every business meeting and it would be good to translate it in Chinese by a skilled translator. Business card is given and received with both hands accompanied with a slight bow, text towards the receiver. They are supposed to be handled with respect all times and if made any marks on it, it should be done out of view. (Pietarinen 2010, 17.)

Gifts are very usual in China and are given in many occasions. The main issue in gifts is not the monetary value of the gift, even though there should be paid some attention to it too, but the most important is the symbolic meaning of the gift. The receiver might not appreciate the gift only because of the color, material or design. Note that especially black and white colors are strongly connected to funerals. Also the wrapping of the gift is important. The most common gifts are alcohol and fruits, but keep in mind that some fruits can have a negative symbolic meaning, such in pears. For business gifts the small goods bearing the company logos, such as pen, books, ties, etc. Usually gift receiver won't accept the gift immediately, but they need to be persuaded to do so. After the receiving the gift, they put it aside and continue the conversation. (Pietarinen 2010, 14.)

Chris Hanage from PapayaMobile mentioned in Game Developers Conference 2013 (GDC 2013), that it's worth to build relationship with distributors if you can. Reason for this can be found in Chinese networking, *guanxi*. Guanxi (关系), as its simplest, means relationship or connection but in reality it has a deeper meaning. In the concept of guanxi includes confusion values, institutional environment, depth of the relationship, experience, skills, need and resource. Also the estimated immediate and long-term benefits of the relationship are valued. If looked in a negative way, guanxi means self-interest and ignorance for corruption. However, when building guanxi network the main reason for it is to get some benefits, such as quicker or cheaper way to solve problems. One of the basic traits of guanxi are *renqing* (人情), favours, which is a way to create, maintain and develop the relationship. By doing a favor, person tells to its recipient their desire to continue the relationship in the future. Renqing also should remain in balance; reciprocal services should not increase too large. (Li & Lehtonen 2014; 10, 16-17.)

3.2. Laws and Regulations

Sometimes it feels like the Chinese government has regulations for almost anything that can be published, yet they still have some loopholes in intellectual property rights. This is also one of the main reasons why Western companies keep Chinese market quite difficult to enter. For the mobile game or application developers however, the Chinese markets have been fairly easy to achieve until very recently. Because of the quickly exploded markets, the authority have woken just now to the all possibilities and threats the mobile industry brings along.

3.2.1. Intellectual Property Rights

Nowadays most value of the company products comes from intangible factors of the production. Therefore Intellectual Property Rights (IPR) has become more important for companies, since it's covering for trademarks, patents, design and copyrights. However, China has been always considered as a "wild east" where everything is copied. Also many Finnish companies has announced that they keep IPR issues as the main barrier to trade in China. Even though China has understood to develop their legislation in past 20 years and joined in World Trade Organization (WTO), there are still gaps in it. This has also started to drive away foreign companies, since the losses in IPR are not anymore covered by the cheaper production costs. Especially so called "bad faith" registrations are a big problem: Chinese operative might take over the company or trademark by registering them under his or her name. In this case, company either has to buy back their trademark with overcharged price or, in a worst case scenario, change the name of their own products and trademarks. (Heikkinen 2013, cited 15.03.2015.) Although in some cases, it is also possible to collaborate with that company or acquire it (Cocoa China 2013, cited 17.03.2015).

The best solution to avoid trademark, patent and copyright thefts is to register them before entering China markets, even if that is not company's current intention. Successful trademark or brand in one market can have many "borrowers" in China. To register IPR in China can be done via Finnish Patent and Registration Office, which can do things swifter and faster with Patent Prosecution Highway contract, or via EU. (Heikkinen 2013, cited 15.03.2015.) Because IPR are usually territorial, they are also suggested to register in China also. Basically the software patent standards in EU are same in China, which means that if it can be patented in EU, in most certainty it can also

be patented in China as well. In most cases software protection in China are suggested to go under the invention patent. (China IPR SME Helpdesk 2014, cited 15.03.2015.)

3.2.2. Internet Policy

China has the third most restrictive internet access in the world. The Chinese government controls the access in two ways: The Great Firewall which limits access to on foreign websites, and The Golden Shield, which is the domestic surveillance. At first they started to block most of the foreign websites, such Voice of America, human rights organizations and some foreign newspapers, but nowadays the block can concern some specific pages of foreign websites or particular terms in search queries and instant messages. The main goal of the restricted internet access is to prevent it to being used to co-ordinate or organize real-world political activities. (The Economist 2013, cited 13.03.2015.)

The Chinese government announced in 2014 that is going to make regulations on mobile applications, because of the security issues. The booming mobile application industry has raised the malware and information stealing problems in China. Some of the applications can be automatically turned on in the background, which causes data traffic and are possibly monitoring other software. For the time being, the Chinese government has already forced real-name registrations for public accounts on all instant message services, including WeChat. (Lee 2014, cited 11.03.2015). Also in March 2015, the Chinese government started to regulate on online usernames in Chinese network. Due this, companies operating in China online have to crack down on the use of certain types of nicknames. The usernames banned under the new rules are the following (Custer 2015, cited 16.03.2015):

- Usernames impersonating or satirizing public figures
- Usernames that harm national security, reveal state secrets, subvert government authority, or harm national unity.
- Usernames that incite ethnic/racial hatred, discriminate against an ethnicity, or harm national ethnic unity
- Usernames that promote/disseminate vulgarity, pornography, gambling, violence, or assassination.

3.2.3. Regulations for Games

As the console games became recently unbanned in China, the Shanghai government released detailed rules for foreign console producers and games, which are going to be sold in Chinese market. All the games must be in simplified Chinese and they are going thru the approval process of Ministry of Culture, including the game updates with new in-game content. Those games that have the following content will be banned automatically (Custer 2014a, cited 16.03.2015):

- Gambling-related content or game features
- Anything that violates China's constitution
- Anything that threatens China's national unity, sovereignty, or territorial integrity.
- Anything that harms the nation's reputation, security, or interests.
- Anything that instigates racial/ethnic hatred, or harms ethnic traditions and cultures.
- Anything that violates China's policy on religion by promoting cults or superstitions.
- Anything that promotes or incites obscenity, drug use, violence, or gambling.
- Anything that harms public ethics or China's culture and traditions.
- Anything that insults, slanders, or violates the rights of others.
- Other content that violates the law

These rules also apply for the mobile games, but the Chinese government have a slightly simplified and speeded up approval process for those games which unlikely contain sensitive racial, political, historical or social issues. That includes tower defense games, platforming, chess, music and dancing games, among other genres. The Chinese government has also stated that time to inspect and approve a mobile game usually takes 5-15 days. (Custer 2014b, cited 16.03.2015.)

3.3. Piracy

When Chinese find something that is successful in western markets, it's easily copied for China markets. Fighting against the IPR can be costly, time consuming and frustrating, especially if that's not made before any copying has happened. Basically there are two kind of piracy possibilities that can happen: consumer piracy or competitor piracy. Consumer piracy is hard to prevent and is in most cases only in vain, while against for competitors' piracy, developers can try to some extent

affect by their actions. (Cocoa China 2013, cited 17.03.2015.) Yet still, it is probably best to not get a headache over it.

One of the consumers commonly used ways is jail breaking their iOS operated phone. After jailbreaking the phone, it has no restrictions. Basically it allows to install third-party applications and customize the look of iPhone. However, there are some cons when jailbreak is done: Jailbreak voids the warranty, the phone becomes more sensitive to malware and some jailbreaks only destroys the phone for good. Jailbreaking is also possible for Windows phones, but the benefits are not as obvious as for iOS, because of the lack of application selection. (Honorof 2013, cited 18.03.2015.) In 2012, 42,4% of iOS operated phones were jailbroken, but in 2013, the volume dropped due a Chinese iTunes replacement KuaiYong. Eventhough this app store is not selling any application, but instead it is letting customers to install pirated apps without jailbreaking iPhones, and for free. (Millward 2013b, cited 18.03.2015.) Moreover, KuaiYong announced to launch their “alternative iTunes” also internationally (Millward 2013c, cited 18.03.2015). However, there has not been any news of their actions later on.

For Android phones, the consumers can root the phone to uninstall the preinstalled applications, which is also illegal (Honorof 2013, cited 18.03.2015). Another developer’s nightmare is Android Applications Packages (APK), which may contain payable applications free of charge. The best solution for this is to publish the application either as a freemium or free-to-play with some advertises on it. (Cocoa China 2013, cited 17.03.2015.)

Unlike for consumer piracy, developers has few ways to fight against dishonest contributors and their copycat titles. One is to appeal the media to embarrass them. This usually works the best when the pirate application is somehow connected to a big company. Another way, according to Cocoa Chinas Survivor’s Guide, is to make the game simply the best, so that consumers are not even thinking about downloading a substitute. This “tactic” has worked well for Fruit Ninja, since it was already free and simply better than its copycat titles. (Cocoa China 2013, cited 17.03.2015.)

One tactic would be to co-operate with the pirating company. For example Rovio, the developer of the Angry Birds, negotiated a collaboration with some of the piracy companies, especially the ones that has brought new ideas for the game. This “pirating the pirate” method, as Rovio’s frontman Vesterbacka has said, was successful as it’s commonly known that the court cannot always help

in these cases. (Ruwitch & Lee 2012, cited 18.03.2015.) It was not only a way to enter to the market, but it also reduced the number of potential competitors (Cocoa China 2013, cited 17.03.2015).

4. PUBLISHING APPLICATIONS IN CHINA

Publishing mobile applications in China can be time consuming in some cases. If application is published without any or only a minor localization, it won't most likely succeed as well as hoped. Also the functionality of the China's application ecosystem can be confusing as it is not as straightforward as it is in Western countries. The vice president of Tencent Game, Peng Lu presented in GDC Europe 2013 a process chart, which makes a little bit easier to understand the differences of game publishing between West and China. As Figure 5 shows, the publishing chain in Western markets don't include distribution & promotion or payment channels, but it is simpler than that. In fact, the distribution channels are more fragmented in China than they are shown in the process chain; in addition of mobile stores, developers may distribute the applications by pre-installation, through several mobile APPs or game portals. There are also several payment channels to choose of. (Lu 2013, cited 30.10.2014.)

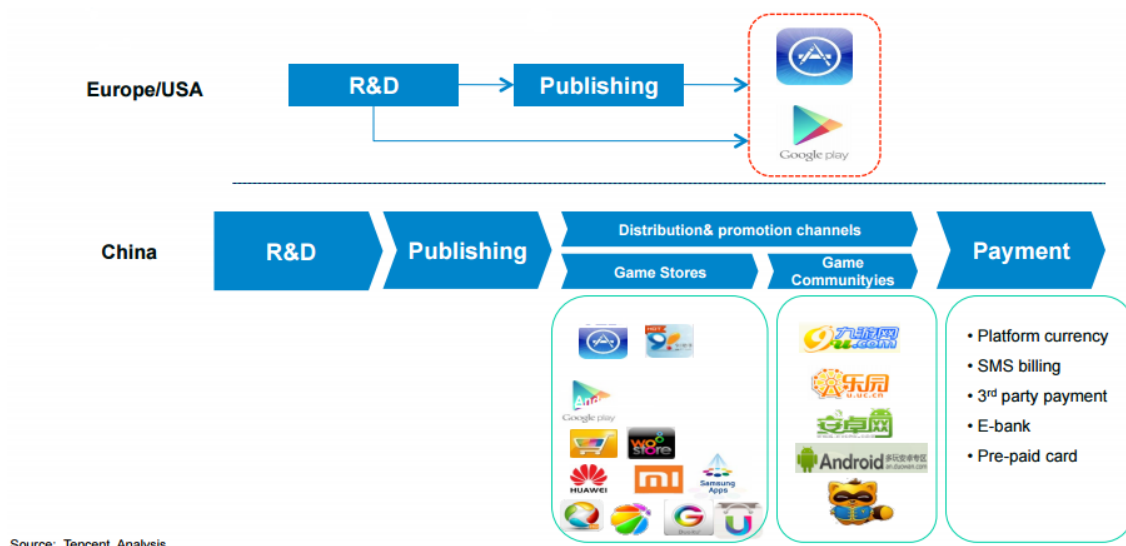


FIGURE 7. Complex Mobile Game Publishing Chain presented by Lu in GDC Europe 2013 (Lu 2013, date of retrieval 26.04.2015)

The key factors to success in China market is not only about high quality game, but also to identify what Chinese users want; even if the western game concepts are getting slowly popular in China, Chinese still have slightly different taste from western players. Also because of the fragmented market penetration of the Chinese mobile phone market, the apps should support as many different kind of mobile devices as possible. Furthermore, it is crucial to find the best distribution and

promotional channels to work with and make sure to have multiple payment channels. (Lu 2013, cited 30.10.2014.)

Entering the China market alone without a partner is in most cases a waste of time. There are many local publishers to choose from as a partner, but if the game is not a hit in western markets, it might not get as much attention from Chinese publishers either. Anyhow, if the western publisher's intention is to develop the game only for China market, it may be a total different story, but it's still beneficial to have some sort of track record from western markets. As a whole, if wanted to publish a game or application in China, it may not need investments, but in the end its better not to expect a high income, since all the publishers and partners are eager to get their share of the profit. (Paalanen 25.11.2014, interview.)

4.1. Publishers

Distribution in China is not simple without a local partner, especially if the brand is not powerful, and there is a gap in the knowledge of Chinese culture (Paalanen 25.11.2014, interview). Especially for a foreign company, one of the main key issue in China markets is to find the right partner for Android markets. Even though China has a mass of potential users, it's still hard to figure out what works and what doesn't. Only a very few can succeed on their own, in particularly with indie games. Even then it's mostly based on luck. (Hong 2014, cited 16.04.2015.)

Finding a right publisher is not easy though. There are publishers who are actively looking to publish western games in China, but in most cases their terms tends to be poor. Probably the most reliable way to enter Chinese markets is to approach publishers that already have experience on monetizing western games in China. Publishers usually have already the certain distribution and promotion channels they use to monetize the games, which makes it easier for developers. Another method could be to try to contact with other local application developing company that have already accessed in China markets and try to publish the application in co-operation with them. (Paalanen 25.11.2014, interview.)

The partner's responsibility is to follow the local laws. That still does not mean that they are not important also for the developer in their business and brand point of view. Even after choosing the

publisher, the developer should demand transparency of their partner and check that their finance and taxation are right and square. (Paalanen 25.11.2014, interview.)

MyGamez is a Finnish-Chinese publisher and a publishing platform for Western mobile games. They have contracts with Chinese operator for SMS billing and they cover all the major channels in China with only one software development kit (SDK). (MyGamez, cited 26.04.2015). Their first games published were Hill Climb Racing, Benji Bananas and Badlands as a pre-installation (Koho 2014, cited 26.04.2015). After publishing Hill Climb Racing – developed by Finnish developer Fingersoft – it reached over 10 million download in a less than a year in China. The success of the game was a bit surprise as it was released only with minimal localizations. (Jordan 2014, cited 26.04.2015.)

CMGE is a leader in mobile game publishing sector with 20.1% market share. They have published more than 750 mobile games since 2011, of which 536 were licensed from game developers. CMGE has a strong expertise with casual games and many of their games published in China have been already famous internationally. (OneSky 2015a, cited 22.05.2015.)

One of the mobile gamer's favorite publisher is iDreamSky, which has published Temple Run and Fruit Ninja among other games. It is one of the largest independent mobile game publisher platforms in the China and helps to redesign, optimize and deliver games through their complex distribution channels. iDreamSky has published over 100 casual games and worked with many world class developers, such as Gameloft and Disney. (OneSky 2015a, cited 22.05.2015.)

Cheetah Mobile is the developer of Clean Master, the world's most popular speed booster for Android phones (Boosh 2015, cited 22.05.2015). They have effective mobile marketing platform and over 350 million large user base. Cheetah Mobile started to publish also mobile games in 2014. (OneSky 2015a, cited 22.05.2015.)

Yodo1 is a mobile game publisher that markets and publishes games in China. They have contacts to 400 app stores, but they also do the customization and localization for the games they publish to fit the market. They also have aggressive IP protection service for their customers to remove pirate versions from the app stores and replace them with original ones. Yodo1 have published e.g.

the localized Ski Safari, which reached 25 million Chinese Players in 6 months. (Yodo1, cited 26.04.2015.)

4.2. Localization

Localization should not be taken lightly. When entering into Asian markets, it is necessary if wanted to success but even then it is best to focus on the overall quality than on localization alone (Cocoa China 2013, cited 17.03.2015). Even though localization of the game is important, it may not be enough in China and in that case they need to be “deep culturalized” (Fong 2013, cited 30.10.2014). Peng Lu from Tencent Games stated in GDC Europe 2015 that “... You need to understand what the Chinese gamers like. Of course they would like to try steak, they would like to try hamburger, but for a long run, if there is a choice, they still prefer rice and noodles.” (2013, cited 30.10.2014).

Whenever doing a translation, people tend to think that the process is done simply by using dictionary, sentence by sentence. But the fact is that translators need to get deep into translatable material to get context right, without forgetting the grammar and other small details such how to mark dates or time in a local way. (OneSky 2014, 13, 18). Despite the fact that translating is the essential part of the localization, Henry Fong from Yodo1 says that the number one rule is to not translating games into Chinese, but to rewrite the storyline (2013, cited 30.10.2014). Games translated into Chinese usually end up rough. When the game idea is understood, it is easier to rewrite completely the game script into Chinese. The new script can involve more internet slang which Chinese love, but also more formulaic expressions and local jokes than original text might offer for the target market (Yip 2014, cited 04.05.2015).

Even the name translations of the application might have some impact. Some foreign language words might be too hard for Chinese to say and especially “L” and “R” sounds are difficult to pronounce and relate on them. Instead of translating the name based on application original pronunciation, it could be easier for Chinese users to relate on it when the name tells the actual function of the application. One great example of this is Evernote, a note taking and archiving application for PC and mobile devices: It translated its name as Yinxiang Biji (印象笔记), which literally means Impression Notes. On top of that the second character, 象, means actually an elephant, which is the logo of Evernote. This kind of name change makes the brand much easier for Chinese to remember it. (Yip 2013, cited 22.05.2015.)



FIGURE 8. Evernote Logo in Chinese (Yip 2013, date of retrieval 22.05.2015)

Translating the application may not be enough though, if wanted to attract as many Chinese users as possible. One of the success factors is how the player can relate on the game. As the culture and historical events differs a lot between the China and other western countries, it's advised to evade subjects which requires too deep cultural knowledge; Chinese might wonder why a dude pulling a sword out of stone is crowned as king, where western don't have any idea who is Zhu Ge Liang. Therefore it is significant to have a subject which either has a meaning for either cultures or it can easily transformed to support one or another. (Fong 2012, cited 24.04.2015.)

Graphic art and sound are vital tools to appeal audience. By customizing some of the key elements of the game with specific cultural factors might appeal the target audience and might allow them to experience multiple sensory dimensions. For example, Rovio released "Mid-Autumn Festival" theme for Chinese gamers just before the major local festival. This theme had related graphics, such as moon-cakes, lanterns and themed backgrounds. (Fong 2012, cited 24.04.2015.) Themes that are relevant for the culture or personalize the gameplay are popular in China and the gamers make more in-app purchases than in other countries. The more opportunities to customize their game by personalized items the better, therefore the game should be easy to customize. (Yip 2014, cited 04.05.2015.)

Chinese gamers are not only eager to personalize their game, but they also love to announce what in-app purchases they have made and which achievements they have attained through social media. This is also an efficient way to get the game distributed to the target group in China. (Di Fausto, 2013, cited 05.05.2015.) Weibo and WeChat alone have 438 million active monthly users.

By integrating as many chat-apps and other social features as possible might allow the game to take off in China. (Yip 2014, cited 04.05.2015.) Chinese users also pursue more grades and rankings than other overseas users and require clear guidance to achieve those easily (Mao 2015, cited 17.05.2015). Therefore tutorials need to have exact introductions for how to start the missions, how to get the needed items and how to complete the game easily. Also the game controls need to be simple for the users. As the varieties attract Chinese players, there should be several missions, quests, daily check-up systems, rewards and items or characters to choose from to keep them on playing. (MyGamez 2015, 21).



FIGURE 9. Localized Fruit Ninja Integrates with WeChat China, Source Originally from iDreamSky. (Yip 2014, date of retrieval 20.05.2015)

Among the “traditional” localization actions, the file size is important as well; because of the small amount of fast wireless internet connections, downloading 20 MB files successfully is unlikely (Jordan 2014, cited 04.05.2015). The reliability is not the only issue, also the expensive data plans, as mentioned before, and old smartphones are common in China, which makes it an unlikely target market for big data files (Yip 2014, cited 04.05.2015). Fingersoft’s Jarkko Paalanen (25.11.2014, interview) says that the file size should be even as small as 15 MB, especially if there is a change to get the game pre-installed to the mobile devices.

4.3. Distribution

The competition between iOS and Android has been worldwide, but Apple and Google took different kind of approaches to enter China. Where Apple embraced China with success, Google retreated almost entirely from the country. Still both Apple's app store and Google Play are globally minorities of app downloads, when taken account the Chinese Android app stores. However, downloads alone don't necessarily mean revenue; According to Digi-Capital, applications distributed in Chinese channel has to hit at least 8 times to achieve the same revenue as iOS, where apps in Google Play has to hit only twice as much. (Perez 2015, cited 19.05.2015). The app stores are not the only way to distribute applications though, but many manufactures are interested to pre-install these programs to their mobile devices (Lee 2012, 124).

4.3.1. Apple and Microsoft App Stores

Applications meant for Chinese iOS or Windows OS users are relatively easy to distribute. The only official channel that Apple offers is their App Store and besides Windows Store, there are only rare few other places for getting applications for Windows phones. However, during May 2015 Microsoft announced that their new operating system Windows 10 would support both iOS and Android applications (Griffiths 2015, cited 19.05.2015). This could help the company in its struggle with iOS, Android and lack of mobile apps.

In 2014 Apple have been busy to sign contracts to add more Chinese payment methods to its App Store. In May, they added direct billing through China Mobile, the largest mobile carrier in China (Xiang 2014, cited 19.05.2015). Later in November, they also made a deal with UnionPay to allow Chinese cardholders – which could be couple hundred million people – to buy goods and services on Apple's App Store (Elmer-Dewitt 2014, cited 19.05.2015). Previously they supported only credit cards and prepayments through online banking even though both of them are not commonly used by Chinese (Xiang 2014, cited 19.05.2015).

4.3.2. 3rd Market

Google and the Chinese government have been at butting heads for some time and this has obviously effected Google's services in the country e.g. Chinese government has blocked most of

the Google internet sites where as Google has never introduced Chinese version of Google Play (Kan 2014, cited 13.04.2015). Nevertheless, Chinese Android users have access to the Google Play as long as the government does not block Google's internet sites, but they can download only the applications with total free content. In addition, the fragmentation of the app stores is not only high, but also leaves a fractional market penetration for Google Play. (Rao 2014, cited 13.04.2015.) Therefore, it is not only recommended but also necessary to get the application published in several app stores which have high user rates and in mobile carriers own app stores to ensure its success in China. Below are mentioned some of the Chinas most used application stores and with most of them, it is possible for customers to install Android .apk files without the need to download the actual mobile version of the app store (OneSky 2015b, cited 13.04.2015).

360 Mobile Assistant (360手机助手) is the biggest Android platform in China developed by Qihoo 360 Technology Co., Ltd. It has over 400 million users, which is around 27 % of the market share. 360 Mobile Assistant is available as a mobile application and a web app. (OneSky 2015b, cited 13.04.2015.)

Myapp (腾讯应用宝) is is an app store owned by Tencent, which has also developed WeChat and QQ. Myapp market share is 26% and it has 64 million daily downloads (OneSky 2015b, cited 13.04.2015).

Baidu Inc., the China's top search engine, owns three famous app stores, Baidu Mobile Assistant (百度应用), which is the biggest of Baidu Inc. app store with 18% market share, HiMarket (安卓市场) and 91 Mobile Assistant (91助手). The last listed, 91 Mobile Assistant was bought by Baidu Inc. in 2013 and has nowadays over 10 million registered users. It is also available for Windows phones (Millward 2014 cited 25.04.2015). HiMarket has over 5 million users in China and has free services for developers. (OneSky 2015b, cited 13.04.2015). Steven Millward claims in his publication "10 alternative Android app stores in China" in Tech in Asia (2014), that he has found HiMarket installed on numerous grey-import Android phones, which have been smuggled in tax-free from Hong Kong. Millward also states that "since a great many of China's Android phones and tablets are grey imports, it's a huge market for app stores to tap – especially as preinstalled stores often cannot be uninstalled".

MIUI app store (小米应用商店) is developed by Xiaomi and is available for many Android device, including their own products. MIUI app store has more than 30 million users and brings most of the revenues of the company. (OneSky 2015b, cited 13.04.2015).

Former employees of Nokia and Google founded SnapPea which is better known in China as Wandoujia (豌豆荚), in 2010. It has more than 300 million users and 30 million daily app downloads. (OneSky 2015b, cited 13.04.2015.)

4.3.4 Pre-Installations

The newest Chinese smartphones are sold with several pre-installed applications to give more value for manufactured products. Not only manufacturers, but also the mobile carriers (Cutler 2011, cited 19.05.2015) do these pre-installation deals. However, several applications are competing to be pre-installed to various smartphone models. (Lee 2012, 123-124.) Furthermore the Chinese government has restricted in 2013, what kind of software manufacturers are allowed to pre-install their mobile devices with. Manufacturers have to obtain a “network access” license for their produced smart devices and include the version of the operating system and basic information about the configurations of any pre-installed apps to the China’s Ministry of Internet and Information Technology. The regulations prohibit manufactures to pre-install software on smart mobile networking devices that will (Livingston 2013, cited 19.05.2015):

- collect and modify the user’s personal information without notice to and consent of the user;
- without notice to and consent of the user, enable communication functions that could have adverse consequences (such as the interruption of network information flows, loss of fees or disclosure of information);
- impact the normal functioning of devices or the safe operation of the communications network;
- contain any information prohibited by law; or
- otherwise impact the security of users’ personal information, the legitimate interests of users or network security.

Despite all the regulations, there are still possibility that malwares are pre-installed in smart mobile devices. In 2014 one of the Chinese local smartphone, Star N9500 was found a pre-installed

spyware program, which send all the stolen information to an anonymous server. Since this Trojan was integrated into the firmware, it was impossible to remove from devices and it blocked all the security updates. (Paganini 2014, cited 19.05.2015.)

4.4. Pricing

Year 2012 was the turn point for mobile game developers in China, after the big mobile carriers made it easier to charge money from mobile app users. Before the changes in the carriers payment system, especially the Chinese Android developers were keener to enter in US markets than stay in China, because the revenues were small. Nowadays Chinese mobile game markets have outrun the US markets easily. (Cutler 2013, cited 16.04.2015.) However, the revenues still do not overwhelm the developers, since partners and other players eat most of the profits.

When imagining that user who download a game, wants to make 100 CNY in-app purchase, by using carrier billing. First of all, the mobile carrier takes 30% of the selling price. Of the remaining 70 CNY, the app store takes around 30%, leaving only 49 CNY. Finally if having a partner, even that 49 CNY might have to be split to pieces. (Bea 2014, cited 22.05.2015.)

Nevertheless, apps that are free to download, but allow users to upgrade the application (freemium apps) work generally well in China. Even though Chinese say the price of the applications doesn't matter, they rarely buy pig in a poke, so unless there is a cogent reason to keep the application as premium, it is not recommended. As the trust of local users has to be earned, paid apps are also more easily pirated in China. (Nimbi 2013, cited 20.5.2015.) Anyway, it is good to keep in mind that no matter which monetization model the developer chooses it will not guarantee the success of the application (Torres 2014, cited 20.05.2015).

4.4.1. Free-to-Play

Applications that use Free-to-Play pricing strategy are – as the name refers to – free to play but may have some optional in-app purchases. It is one model of the freemium method, which generally is a popular way to make a profit by giving away the main core of the application for free and then charging up the upgrades or other extra contents or improvements for it. In some cases, this type of applications are not full versions of the app itself i.e. “lite” versions or the “free” application has

full features just for a trial period. This is a sort of strategy to get attention from customers with the “free” tag to get them try the app and get them hooked in the process. (Nagelmann 2013, cited 20.05.2015.) One of the most used freemium method is subscriptions, where users pay a certain amount on a certain time-basis and access premium features or content for a certain time. Most of the music and video apps, communications networks and some online media e.g. Spotify or WhatsApp use subscriptions to earn revenue. (Torres 2014, cited 20.05.2015.)

At its best, free-to-play games offers the complete games with some purchasable features, but unfortunately there are also games where freemium model is done poorly. In some of examples, there might be so many restrictions that the game is nearly impossible to play without unpaying. (Nations, cited 20.05.2015.) To be truly succeeding in Free-to-Play model, the game has to be free to play and to win, but it offers those attractive features that prompt people to buy them (Torres 2014, cited 21.05.2015).

Practically, free features can be also considered as an effective marketing tool: it attracts users without investing costly advertising campaigns or other sales force and subscribe fees charged are sometimes even more profitable than in-app ads. These are also more successful than trials or limited-term offers, because customers find free access more compelling than awkward cancellation processes. As the main purpose of the freemium is to attract new users, developers should carefully think about which features to keep free and which payable. Trying to keep the balance is difficult, but necessary though. In example, if there are not new users, it most likely means that there are not enough compelling free features, and in the other hand, if there is many users but not enough profits, the offerings are too rich. (Kumar 2014, cited 21.05.2015.)

Since Chinese users are cost-conscious, Free-to-Play applications and games with integrated app purchases (IAP) are great way to attract them to use the application, especially if there is a clear reason to do the purchase such as regaining life quicker for games. When Chinese players pay with real money, they usually get greedy for small benefits what they could possibly get when making the purchase, which makes combined discount packages and VIP status offerings important. (MyGamez 2015, 23.) Nonetheless, it is good to know that Chinese players are pickier than e.g. US players, when it comes to this pricing model. There has to be more free features in the free version to prove the value of the game, but at the same time there has to be enticing options to modify or faster the gameplay so that they consider to upgrade it (Karim 2012, cited

21.05.2015). One good method to get players to make in-app purchases is to provide free boosters for new players. This could end up with habit to use boosters whenever the missions or gameplay is getting too difficult. (MyGamez 2015, 23.)

4.4.2. Payments

China is still in most part a cash-based society and people rarely use credit card or other Western payment, which makes it difficult for developers to make money on in-app purchases. 75% of the app payments comes through direct carrier billing, which makes developers to want work with mobile carriers. One way to organize this is to use international digital payments processor Fortumo, as they have relationship with all three mobile carriers in China and in many other countries. (Tu 2013, cited 22.05.2015.) Using Fortumo is free, but if transactions are made, they charge a small percentage, which is added on top of the mobile carriers share. They also handle the taxes behalf of developers. (Fortumo, cited 22.05.2015.) All carrier billers, China Mobile, Unicom and Telecom, takes around 30% share of the in-app purchases (Bea 2015, 22.05.2015).

Alipay is a Chinese 3rd-party online payment platform by Alibaba Group, which is similar to PayPal with few exceptions. One of them is that it keeps the money in escrow until the goods have arrived in satisfactory fashion. This feature has helped to ease customers in a market where are lots of false advertisements and fake products on the move. User can also purchase movie or plane tickets aside of making other payments or check their investments through the app. Alipay has more than 300 million users in China and 17 million in overseas. (Larson 2015, cited 22.05.2015.) It is also a good option as a payment service for in-app purchases as they only take 2.5% shares per purchase (Bea 2015, 22.05.2015).

Virtual currency is the economy of game itself, but it can actually bring real money for the developer. It is also frequently used by consumers as an exchanging value, even if they don't always realize it: credit card points, air miles and coupons are actually currencies that have a certain value in money. Virtual currencies can be in many forms and are used across the payment landscape to make good exchanging faster. Because of social networks and mobile applications, these tokens have gained more attention, due the use of virtual coins to buy upgrades or other goods in them. Consumers are also getting more familiar to utilize several forms of virtual currencies on a daily basis. (McKee 2013, 1-3, 8) In China the use of these currencies have been regulated, and those

who are allowed to operate under the law are online gaming operators and online gaming virtual currency exchange service providers. To be either of those, company has to have minimum capital of 10 million CNY. Also the virtual currency is prohibited to use outside the online gaming context, however in reality its use in China is growing instead despite of strict laws. The most popular virtual currencies are Q-Coins by Tencent, U-Coins by Sina, POPO Coin by Netease and there is also a small and growing use of Bitcoins. (Pillsbury 2013, cited 23.05.2015.)

4.5. In-App Ads

Advertising in applications has become more common as people are spending more time with their mobile devices. Chinese are more eager to click an ad than in UK or US, which actually supports the fact that mobile advertising market in China is estimated to grow from 2 billion USD (2014) to more than 4.1 billion USD in 2017. However, getting an in-app advertisement published for a right target segment is difficult without a local network partner: Android OS may dominate the smartphone markets, but there are more Apple users in big coastal cities, not forgetting the consumer behavior. To succeed in mobile marketing in China means to learn from others mistakes, embrace and understand local trends. (Jaffer 2015, cited 21.05.2015.) Also, the Chinese government has regulated that online advertisements has to be closable with one-click (Cluster 2014c, cited 24.05.2015).

Despite the fact that targeted ads are a curse in most of the countries or regions, in China they are highly sought after. In January 2015, many WeChat user took offence for not being qualified to see BMW ads and many have even complained of having their data mined and ignored. (Clover 2015, cited 21.05.2015). This tells that Chinese like to know where they stand out in the society and brag about it.

The biggest problem for both app advertisers and developers is go through the largest channels, such as Tencent, Baidu and Qihoo. The deals with these channels are made face-to-face and top of that, they tend to take 30 to 40 percent share per purchase. There are also some benefits to go through big channels: the app is promoted within their app store and they make sure that the market place is free of pirated copies. (Feloni 2014, cited 21.05.2015.)

In spite of going through every channel one at the time, there are also ad networks that are increasingly becoming major players internationally and worth to look at (Giggs 2015, cited 21.05.2015):

Mobvista is a mobile affiliate network that specializes in mobile advertising and mobile game publishing. Their ads get more than 5 million daily impressions and have a large selection of Cost per Action (abbr. CPA) and Cost per Impression (abbr. CPI) offers for Android and iOS platforms.

Madhouse channel features with Android, iOS, Mobile Web and Windows Phone platforms and offers monetization solutions through their own cloud-based mobile app advertising platform, SmartMad. They also have MadServing, which enables advertisers to serve ads for users based on preferences or demographics.

Adwo is one of the largest mobile ad networks in China. It has served more than 3,000 branding and 5,000 performance ads in China and the top developers can earn up to 2,000 USD in a week. They ads can be featured in Android and iOS platforms and many pricing models available.

5. CASE FINGERSOFT

Fingersoft is a Finnish mobile application and game developing company established in 2012, which very first game Hill Climb Racing brought it over 15 million EUR turnover. It was also achieve more than 140 million users worldwide. Moreover, this all happened during the corporation's very first financial year. (Talouselähti 2014, cited 22.05.2015.) Hill Climb Racing itself is a rough looking game with a simple and addictive idea to get the driver as far as possible, by doing stunts and keeping him alive. At the beginning of the year 2014, Fingersoft published its Western megahit along with Benji Bananas with the assistance of MyGamez. It may not be a surprise that Hill Climb Racing was popular in China as well, but the fact that it was published there with only minimum localization and was still a hit, can surprise some people (Jordan 2014, cited 22.05.2015).

In Nordic Game Conference 2013, Jarkko Paalanen, Business Development Director of Fingersoft was only wondering how the Chinese mobile application and gaming market are functioning. Even before entering in the market, Fingersoft was already been contacted by some Chinese companies that were interested to publish their game in that market. Most of the information of the market came from reading news articles and getting familiar with companies operating models. However, the communication with them was hard and the contracts they were offering were not appealing. (Paalanen 2014, interview.)

Later on the roads of Fingersoft crossed with Mikael Leinonen, who was establishing new start-up MyGamez. MyGamez was intended to be established with a different concept to publish games with minimum localization which would not be dependent of the channels and had already contacts with China Mobile. Nonetheless, the decisive factor to cooperate with MyGamez was the ease of communication and what kind of effort Fingersoft had to give out for the localizations when the company wanted essentially only try out the markets. (Paalanen 2014, interview.)

Even though the success of the Hill Climb Racing in the Western markets was undeniable and there were already a number of copies of it in the market, releasing it with only translating it to Chinese in China brought some doubts, especially with the local negotiators. The acceptance of Benji Bananas however, was way more excited, as the colors were bright and it was more sympathetic for Chinese users to relate. Still, both games were published only with minimal

localizations, as Hill Climb Racing was persuaded to publish with only statistics of the game. (Paalanen 2014, interview.)

The games were distributed in tens of app stores and had purchases around 1,5 million times per month in a less than a year. Even though Benji Bananas was much more suited on behalf of localization for Chinese consumers it still reached only a fraction of Hill Climb Racing popularity. Anyhow, it was already known that the monetization of the game had some problems already in Western markets. Yet the difference is that major of the profit that came from Hill Climb Racing in the Western markets came from in-app ads, when in China version, there are none. Benji Bananas had basically the same problem. (Paalanen 2014, interview.)

Even today Hill Climb Racing is updated regularly and it has been downloaded more than 260 times worldwide, most players coming from Northern America and Europe (Utoslahti 2015, cited 23.05.2015). In China, it has more than 15 million downloads across app stores. Because of the game had a good adoption in the market, Fingersoft launched China Edition of Hill Climb Racing during the Chinese New Year. In this version of the game the localization was made to provide best possible experience for the fans. (Suckley 2015, cited 23.05.2015.) Also Benji Bananas have been made a new monetization model by its developer, Tribeflame (Paalanen 2014, interview).

6. CONCLUSIONS

China's mobile application and game market is growing and developing rapidly due to fast adoption of smartphones in past two years. As the demand has also brought along some local brands especially for Android operating system, the prices have dropped as well. Moreover, smart mobile devices have become more entertainment oriented, bringing along the segment of serious gamers who are willing to use money to enrich and fast their gameplay. This segment has been growing swiftly in a past few years and expected to be worth over 3.6 billion dollars by the end of 2017 (Hanage 2013, cited 24.05.2015). Because of this, new information of the Chinese market is coming all the time and the Chinese government has also taken action to regulate it as fast as it can. Even during the authors writing process, there became new regulations concerning of usernames. That's why it's important to follow news and blog posts from relevant authors and companies to get out the newest information of the field.

The black market has always been China's weakness and even if the Chinese government and other partners have taken this more seriously in the past years, it's hard to keep in control and particularly famous apps are quickly getting pirated versions published in the market. There is also a high possibility that those western apps that are not even officially in China, have pirated versions already there. Even though there are some preventing actions that can reduce the piracy rates in the Chinese market, it should not be taken in a matter of heart as it cannot be fully prevented.

Distributing games to iOS and Windows OS app stores are straightforward as their official channels are theoretically only ones in China. There might be few app stores that give away some applications for Windows OS besides Windows store, but they are in small number which don't have a big impact in their distribution. Android app stores however, are much more fragmented, since Google Play offers only fraction of their whole application selection in China. There are hundreds of stores from big players like Tencent or Baidu to mobile device manufacturers own app stores, and some of them have millions of users. Best way to distribute Android applications is to apply it to 5-10 biggest app stores.

Publishing a Western application in China requires localization actions for them to be succeeding. Translating is a minimum action application usually need, but also graphics and subjects of the games are in some cases required to be culturized so, that Chinese users can relate them. Another

important factor is to integrate locally used payment methods, if the applications has in-app purchases. Credit cards or other Western payments are not common in China and most of them use mobile carrier billing system when doing mobile application or in-app purchases. To get in-app ads and to advertise in them, the developer can make it easy for their self by going to network channels.

Some local partners may help with piracy with some actions, but they can also absorb some of the taxes and help developers to make necessary adjustments for the apps. In many cases, they also have agreements made ready with some distribution channels, which saves the developer's time. Therefore when entering to China mobile application markets, it is more than recommended to find a local publisher who already have some track record on publishing western applications to Chinese Android market as they tend to have most knowledge of the taste of Chinese app users. In most cases it is more beneficial for developers to hook up with local partners than establishing any affiliated companies, even though they take their share of the profit.

When going to China mobile application market, western developers should be aware that even if the game has some success in there, the profit may not be tremendous. Partners, app stores, payment organizations, advertising channels and the Chinese government want their share of the sales, decreasing the developers share to around 20% of the sale price. However, if the game is already famous in West, there are chances that it could be success in China too with relatively small effort.

7. DISCUSSION

The original purpose of this thesis was to get relevant information of the Chinese mobile gaming market for Windows and Android operated phones. Since the Chinese markets are more divided by Android and iOS, and the western application developers has entered the country only a few years, the final study focuses to be as a guideline to mobile application market. The objective was to introduce the market, consumer behavior and the legislation so that it can be used several developers who has intention to enter China.

The material of the study was mostly collected from large amount of news article, publishers' blogs and conference videos about the subject. Even though Western companies have entered to Chinese application market for couple years now, it yet lacks specific literature of the subject. There were some short guides about the subject, but they were generally short and the content similar. Apart of internet sources, I also got an interview from Jarkko Paalanen from Fingersoft, who gave some good inside of the markets, as well the company's story of the market entry.

Timetable of the study was delayed, as there came new information of the markets and the Chinese Government released new regulations which frustrated the author. Since the information was scattered throughout many sources, it took time to analyze and gather the primary data together. To verify the need of the information of the developers, the author collected opinions of the gathered data from people working closely in the fields.

Even though China has been considered generally a wide market, the mobile application industry feels much easier to manage and understand, although it is still hard to enter without a local partner. Because of the sudden growth, the Chinese government has only now started to regulate the field and there may be some possibility for a change in the market, which both require an active tracking to keep up with the field. Still this has been educational journey for the author. In addition for this thesis, there could be a study on how developers can market and advertise their applications in China effectively.

During the writing process, there has been many interested developers of the thesis, and it seems that the subject is a pressing issue in the companies. The author would like to thank every one of the interest towards the thesis and hopes this study helps them on their road to China market.

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APPENDICES

Main questions of the interview

1/1

Haastattelun pääkysymykset:

- Mikä innosti teitä lähtemään Kiinan mobiilipelimarkkinoille?
- Kuinka paljon ja millaista tietoa etsitte kohdemaasta tai sen markkinoista ennen lopullista päätöstä? Mikä oli ratkaisevin tekijä?
- Millä pelillä/peleillä päätitte lähteä Kiinan markkinoille? Mitkä olivat mielestänne pelin vahvuudet Kiinan markkinoille? Entä heikkoudet?
- Kuinka paljon ja miten muokkasitte peliä ennen sen julkaisua Kiinassa?
- Käytitte pelien viemisessä toista julkaisijaa. Miksi? Mitkä olivat ratkaisevat tekijät julkaisijan valitsemiseen?
- Kuinka moneen mobiilisovelluskauppaan pelit julkaistiin? Mikä oli pelin latausmäärä ensimmäisen viikon ja kuukauden aikana ja paljon latauksia on kertynyt yhteensä? Onko peli päässyt mobiilisovelluskaupassa sijoituksille (Top 10 tai vastaava) ja jos on, millaisia sijoituksia ja kuinka monessa kaupassa?
- Miten markkinoitte peliä Kiinassa?
- Mikä teidän mielestänne oli hankalaa tai turhauttavaa kun yrititte saada pelejä Kiinan markkinoille? Mitä tekisitte toisin?
- Millaisia käytännön vinkkejä antaisitte niille yrityksille jotka suunnittelevat mobiilisovellusten tai – pelien viemistä Kiinaan?