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INTRODUCTION

China is the biggest gaming market on the planet. It's also one of the most challenging markets for Western developers to enter. Not only do Chinese gamers prefer particular genres and styles of games, but the whole process of localizing and launching games in China means that it's not a market to be approached lightly.

Even for developers who optimize their games and gain approval to have their games in China, reaching end users can be a real challenge. Three companies – Baidu, Alibaba and Tencent – dominate the social media and internet landscape, meaning that the channels to market and ways to promoting your game are also very different. This ebook is designed to give game developers and publishers a degree of insight into what makes the Chinese market so unique and to help companies take the first step towards making their launch a success.

Across mobile and PC games China is now the number one market in the world, with an annual value of more than $32 billion. That's a quarter of all the money generated by games around the world. According to China-based iResearch, mobile game revenues alone topped 102 billion Yuan in 2016 – that's over $16 billion.

Chinese gamers may have had a reputation in previous years for favoring free to play mobile games above all else, but as the data in this report shows, Chinese gamers are more than happy to pay for games and content that they like. In fact, Chinese gamers have become far more discerning, seeking out quality games and global brands.

As the Chinese mobile games market has become bigger, so too have the aspirations of many of the leading publishers. Some of the most significant acquisitions in recent years have been by Chinese companies, with Supercell, Jagex, Outfit7 and Space Ape Games all snapped up.

But while many publishers would like to launch their games in China, even the most experienced hands can find it challenging to navigate a market that is so big and which changes so quickly. That's why we created this guide - to give everyone the opportunity to capture a slice of the biggest games market of them all.

Thanks to our experience in helping companies launch and monetize their games in China we've collected together tips and insights into how to get your game published in China, how to promote it and what kinds of games and monetization strategies work best.
Now, we’d like to put you on the map.
SECTION I
GETTING TO KNOW CHINA
FACTS AND FICTION ABOUT LAUNCHING MOBILE GAMES IN CHINA

Launching your game in China is different to most other countries in the world. Although Apple users in China are well served with the official Chinese app store, Google Play is not currently authorized in China, meaning that Android apps rely on some alternative app stores and distribution channels. Navigating these is a considerable challenge.

The Chinese government is also part of the launch process in China. Since 2016, all new mobile games must be approved, which has added an extra layer of complexity. Working with local partners is one way of overcoming these issues, as they are more familiar with the rules and regulations. Indeed, launching a foreign-developed Android game is almost impossible without the support of a Chinese publishing partner, as overseas companies are typically prevented from online publishing and promotions. Plus, only China-registered businesses can receive payments and collect user data.

Launching iOS apps

For overseas companies launching iOS games, it’s possible to bypass many of these issues thanks to the way the Apple App Store works. In the iTunes Connect options, there are a series of boxes which allow you to select which app stores you want to launch on - including China. Although you still need to make sure your app is translated into Chinese and does not contain any prohibited content or images, this tick-box option effectively allows you to bypass the regulations that Android apps must adhere to.

It may be that this option will be removed at some point in the future, but for now, this means that it's reasonably straightforward for non-Chinese developers to self-publish in China.

How difficult is it to enter the Chinese market?

The following information may shed some light on this question:

- New product rate on the China’s App Store among the top 200 apps(referring to the proportion of games released within seven days among the top 200 best-selling apps) is 13%. The volatility index, an indicator of unstability of the top 100 mobile game rankings, was 86% (the higher the index, the less stable is the ranking).
- The business of chart boosting in China is mature, but what’s challenging is to maintain the ranking of an app once it is on top, which requires a lot of efforts.
• Among the top 20 best-selling list on China’s App Store, 55% of all apps have been released for more than a year; and 25% have come to the market for less than six months.

What do publishers who’ve launched in China think?

To get an accurate view on how difficult it is for Western publishers to launch games in China, we teamed up with our colleagues at GameAnalytics to ask representatives from 400 companies what their experiences were like.

As you can see, the vast majority - almost precisely two-thirds - said that it was harder than they expected to get their game launched. Fewer than 17% of the companies we spoke to said that the process had been easier than they expected.

When we drilled down into precisely what aspects of launching were the most challenging, we found that the regulations around publishing was a significant issue. However, in combination, it is getting localization right that appears to be the biggest overall barrier to a successful launch. We look into localization a little later on.
A minority of companies told us that they just weren't ready for the amount of work required to launch in China. Hopefully the information in this guide will provide the necessary guidance to developers.

The three biggest challenges when launching in China
Based on our survey, we found that three main issues came up again and again.

1. Navigating government policies and regulations

The most important thing to know is that every mobile game published in China must have a code or publication number. This is issued by SAPPRFT (State Administration of Press, Publication, Radio, Film and Television of The People’s Republic of China), and requires that the game built is submitted for approval in advance. How long this process takes depends on the complexity of the game; the following guidelines were published in 2016 when the requirement was first introduced.

- **Simple games** - minimum 20 days approval time
  
  To be approved, these games must not have any political, military, national, or religious content, and should have a simple or non-existent plot or storyline.

  Games that are classed as match-3, endless runner, flying, chess, puzzle, sports, dance, music, or similar genres fall into this category.

- **Other domestic and foreign mobile games** - 3 months or longer approval time
  
  The requirements for these games are more stringent, and due to the level of testing required, the approvals process is longer. For non-domestic companies, the advised approval time is three months upwards (another reason to partner with a local company).
These games should not show or encourage anything that is seen as contrary to China’s constitution, or do anything to threaten the Chinese government’s view on national unity, religion, traditions, culture, security or reputation. Anything that promotes gambling, violence, drugs or obscenity is also forbidden.

As we’ve mentioned already, it’s possible to use the iTunes Connect ‘feature’ to avoid these lengthy submission times if you are publishing an iOS app and are based outside of China.

When it comes to promoting your game, there are a number of different licenses required depending on what media and channels you plan to use. This is definitely a reason for working with a local company which will already have the necessary permissions and licenses in place and will have existing relationships with all of the critical marketing and advertising partners.

2. Localization and translation

To localize your game effectively means a lot more than just converting the text into Chinese. Regarding UI, there are vast differences between western aesthetics and Chinese, which can have a significant impact on the overall design and user flow of the game.

There is also the aspect of localizing your game to Chinese cultural tastes and preferences. Adapting some of the graphics to show Chinese buildings or places, or even just using a specific color (red is associated with luck, happiness and joy, for example) can make your game more attractive to your audience. We look at this in a bit more detail in the later section on tips on localizing game graphics.

The other critical aspect of localization is choosing the right game genre in the first place. Although China has plenty of games of all kinds, the most popular genre of games by far are casual puzzle games. There are also significant audiences for MMO and RPG style games, although there can be big stylistic and gameplay differences between the kinds of RPG game you’d see in Europe and the US versus China, Japan and Korea.

The lesson here is that Chinese mobile gamers have definite preferences for what they like to play; if your game doesn’t reflect this, then you will find it extremely hard to build an audience.
3. The lack of Google Play and the fragmented Android ecosystem

Right now there are over 300 different app stores just for Android apps in China - but no Google Play store. This is because of a disagreement between Google and the Chinese government over the privacy of Google’s data, meaning that Google (along with Twitter and Facebook) does not have an official presence in China. However, it can be accessed by using VPNs or other workarounds, but for the average user this is not primarily useful as purchasing apps, or in-app items remains impossible. The absence of Google has meant that domestic companies, led by Tencent, offer their own search, social media and app store solutions.

**TOP 10 APP STORES IN CHINA**

BY COVERAGE ACROSS ALL ANDROID SMARTPHONES & TABLETS | NOVEMBER 2017

<table>
<thead>
<tr>
<th>RANK</th>
<th>APP TITLE</th>
<th>PUBLISHER</th>
<th>CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MYAPP(TENCENT)</td>
<td>25.1%</td>
<td>-</td>
</tr>
<tr>
<td>2</td>
<td>360 MOBILE ASSISTANT</td>
<td>16.1%</td>
<td>-</td>
</tr>
<tr>
<td>3</td>
<td>XIAOMI APP STORE</td>
<td>12.5%</td>
<td>-</td>
</tr>
<tr>
<td>4</td>
<td>XIAOMI GAME CENTER</td>
<td>11.9%</td>
<td>-</td>
</tr>
<tr>
<td>5</td>
<td>HUAWEI HIAPP</td>
<td>10.1%</td>
<td>-</td>
</tr>
<tr>
<td>6</td>
<td>BAIDU MOBILE ASSISTANT</td>
<td>9.9%</td>
<td>-</td>
</tr>
<tr>
<td>7</td>
<td>OPPO APP STORE</td>
<td>7.9%</td>
<td>-</td>
</tr>
<tr>
<td>8</td>
<td>SOGOU MOBILE ASSISTANT</td>
<td>4.4%</td>
<td>-</td>
</tr>
<tr>
<td>9</td>
<td>VIVO APP STORE</td>
<td>3.6%</td>
<td>-</td>
</tr>
<tr>
<td>10</td>
<td>VIVO GAME CENTER</td>
<td>3.6%</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: NewZoo

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As you can see in this chart from NewZoo, the reach of these local app stores quickly drops once you are outside of the big five. However, it’s still necessary to launch on multiple stores to reach a good proportion of Chinese mobile gamers. When talking about their own experiences of launching Android games in China, Ethan Collins, business development manager at Beijing-based game publisher Yodo1, shared that they published Rodeo Stampede across more than 60 Android app stores in China.
EIGHT USEFUL TIPS FOR SUCCESS IN CHINA

1. Although Android is the most popular platform in China, there is no Google Play store. Instead, there are more than 200 Android app stores, which makes Android games a bit more complicated to publish than iOS. However, it’s still possible to launch hit Android games, as long as you work with a good local publisher.

2. Don’t underestimate the complexities of launching your game in China. Although China has become the biggest market for games in the world, it poses some unique challenges too. Our survey found that 66% of mobile game companies found launching in China harder than they expected.

3. If you are launching your game on iOS, it’s possible to get around a lot of the rules and regulations that Android games have to go through. If you are launching an Android app, you are required to publish through a Chinese-registered company.

4. All mobile games must be registered and approved by SAPPRFT (the State Administration of Press, Publication, Radio, Film and Television of The People’s Republic of China). This can take several weeks or more. However, if you are an overseas company, you can launch your iOS game without going through this process.

5. Localizing you game correctly is essential. Think about everything, from the game name, UI and colors to the art style. Good localization is far more than just what language your game is in!

6. Companies like Baidu, Tencent and Weibo have apps and services that are used by hundreds of millions of Chinese every day. Launching your game will almost certainly involve working with them on your marketing and advertising strategy.

7. Social media influencers are a vital marketing channel in China. Influencers are big business - with millions of loyal followers they can promote your game to.

8. Compared to mobile gamers from the rest of the world, Chinese gamers play more games, less often, but when they decide to spend money they spend as much if not more than gamers anywhere else.
SECTION II

ENTERING CHINA
SUCCESSFULLY LOCALIZING YOUR GAME

As we’ve already said, localizing your game is crucial to an effective launch. The first step is considering what genre of game is the most appropriate for Chinese gamers.

<table>
<thead>
<tr>
<th>Genre</th>
<th>China</th>
<th>rest of World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Simulation</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Arcade</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Adventure</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Puzzle</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Casual</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Kids</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Strategy</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Simulation-Vehicle/Flight</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Racing</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Genre</th>
<th>China</th>
<th>rest of World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action-Fighting</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Role Playing</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>Sports</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>Educational</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>Card</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>Arcade-Runner</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>Puzzle-Match3</td>
<td>17</td>
<td>12</td>
</tr>
<tr>
<td>Action-Shooter</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>Family</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>Board</td>
<td>20</td>
<td>21</td>
</tr>
</tbody>
</table>

This chart from GameAnalytics shows a comparison between the most popular game genres in China versus the rest of the world. As you can see, they are broadly similar; however, this doesn’t necessarily show the percentage of all installs that go to the most popular game genres.

This infographic from analyst firm Niko Partners\(^2\) shows how dominant certain types of games are - with 69% of downloads coming from just five game genres. Although it’s more than a year old now, it’s a good example of how not all games are created equal.

When it comes to the games that generate the most money from Chinese gamers, MMO and RPGs dominate the top of the charts. While there is quite a lot of volatility further down the rankings, more than 50% of the top 20 games in China have been there more than a year, with only 25% of the top 20 newer than six months old.
Localizing for language

Everyone in China speaks Chinese, right? Well, not quite. China and its surrounding countries have a diverse linguistic heritage, which means that there is no single choice when it comes to localizing your game.

The main languages spoken in China are Mandarin and Cantonese. China also has two written languages - Simplified Chinese, which is used in mainland China, and Traditional Chinese, which is used in Hong Kong, Macao and Taiwan.

Chinese is a language that is rich with cultural references and secondary meanings. Often, the sound of a word or name is as important as its meaning. Therefore, working with a native-speaking translation agency is essential to avoid any unforeseen problems. Local grammar and syntax are also incredibly important, as mistakes can easily change the meaning of the text.
Localizing the art style

In China, many gamers prefer a graphical style known as ‘Chibi’. This emphasizes big eyes and exaggerated features - similar to the kind of character art you see in Japanese anime. The Chinese chibi style emphasizes cute, humorous depictions. For example, a game character like Tomb Raider’s Lara Croft is the opposite of the typical wide-eyed, super-feminine chibi character.

![The War goddesses Sivir and Akali in US version (on Left) and Chinese version (on Right) of League of Legends.](image)

In this example taken from the US and Chinese versions of League of Legends, you can see that the character (the War goddesses Sivir and Akali) have been drawn with two very different styles. The US version puts more emphasis on the character’s strength and gives her a (slightly) more realistic body and face, and more defined muscles.

In contrast, the Chinese version leans more towards a more cartoonish, softer style. Her body is more exaggerated, the face softer and less angry-looking, and the hair is more stylized - and a lot bigger!

While some of these differences are no doubt cultural and aesthetic, it's worth remembering that strict regulations are restricting how violence and combat are shown, and so this is also a reason for the softer art style.
Another example from *League of Legends*, this time the character of Anne. Both of the characters have been drawn in a chibi style, but in the US version, Anne and the bear look fierce bordering on violent, with a dark background and swirling snow that create a sense of foreboding.

In the Chinese version the overall tone is much brighter, and while the bear still looks fierce, the glowing eyes and claws are gone.

It's also quite common for companies to change in-game graphics to incorporate settings and objects that have an obvious Chinese aesthetic.

For example, in the Chinese version of *Subway Surfers*, the normal level design has been changed to include Chinese tiled roofs, complete with hanging lanterns. You may also notice that the colour scheme includes a lot of red, blue and yellow - colours in Chinese tradition are associated with the three elements fire, wood and earth.
Travel Frog is a mobile casual game developed by Japanese game company Hit-Point. Released on Android in November and on iOS in December, it became a huge hit thanks to its cute art style and ‘zen’ gameplay. In just over a month the iOS version had been downloaded more than 10 million times, with 95% of the global downloads coming from Chinese players. All the more remarkable then that the game had not been localized for the Chinese market; the game just happened to perfectly capture the Chinese love of casual games and chibi style.
Localizing your customer support and community

Not every game needs localized customer support. But don’t forget that Chinese gamers don’t have access to Twitter or Facebook as simple means to post about a problem or ask a support question. Plus, once again, there is the issue of the language barrier. There are specialist companies in China that can put together a customer support strategy using the appropriate social media and online channels.

For example, a major game will have some ways for players to communicate both with the game publisher and other players within the community. There would be an official player QQ group for the game, an official WeChat public account, an official online forum, a Baidu Tieba forum, a Weibo account, and potentially several other specific community platforms. All of these must be maintained, curated and moderated on a daily basis.

Chinese games will also often introduce a tiered service system, offering standard, VIP, and even super-VIP levels of support and access. Depending on how much a player spends within a game or how valuable they are seen to be, they will be given priority when it comes to dealing with queries and requests. It’s no different really to how casinos will offer the best services to the biggest gamblers.

An example of a VIP-level service includes:

- A VIP-only dedicated 1:1 phone service
- Priority for any issues or problems
- A dedicated VIP evaluation and complaint mechanism
- A special VIP feedback mechanism
- Unique promotions and offers only for VIPs
- Special VIP badges, icons and other status symbols

There can even be a special follow-up service when a VIP stops playing a game, to see exactly why they stopped, and whether they can be enticed back.
PUBLISHING YOUR GAME IN CHINA

As we discussed in an earlier section, if you are an overseas company looking to launch an iOS game in China, it’s perfectly possible to self-publish as you can bypass the requirement for SAPPRFT to register and approve your game.

In fact, Kabam decided to self-publish its free-to-play title Marvel: Contest of Champions in China, with great success.

However, for the majority of publishers, working with a local partner is the preferred option. If it’s an Android game, it’s mandatory that the publisher is a China-based business. Unless you are a big enough company to incorporate your own Chinese office, you’ll need to find the right partner to work with. At present, there are mainly two kinds of publishers in the Chinese game market: Third-party publishers and platform-based publishers.

Third-party publishers

This is the most common type of publisher, where they oversee the launch, distribution and promotion of the game in return for a revenue share. In China, there are several significant third-party publishers who support both domestic and non-Chinese games. These include Longtu Game, Elex Tech, 37wan.net, Yoozoo, Funplus, IGG, Happy Elements, Yodo1 and iDreamSky.

App Annie recently created a useful list of the top global mobile game publishers, which includes most of the key players in China.
## Top 52 Publishers of 2017

*Worldwide iOS & Google Play Combined Annual Revenue 2017*

<table>
<thead>
<tr>
<th>RANK</th>
<th>Publisher</th>
<th>HQ Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tencent</td>
<td>China</td>
</tr>
<tr>
<td>2</td>
<td>NetEase</td>
<td>China</td>
</tr>
<tr>
<td>3</td>
<td>Netmarble</td>
<td>S.Korea</td>
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<tr>
<td>4</td>
<td>Activision Blizzard</td>
<td>USA</td>
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<tr>
<td>5</td>
<td>Supercell</td>
<td>Finland</td>
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<td>miini</td>
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<td>43</td>
<td>Caesars Entertainment</td>
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<td>Pandora</td>
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<td>51</td>
<td>Kakao Corp</td>
<td>S.Korea</td>
</tr>
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<td>52</td>
<td>KLab</td>
<td>Japan</td>
</tr>
</tbody>
</table>

*Playtika revenue included under this publisher

App Annie’s Top 52 rankings are based on App Annie intelligence and DNA data as of December 31, 2017

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LOOKING EAST: HOW TO LAUNCH MOBILE GAMES IN CHINA 20
Platform-based publishers

These are publishers such as Tencent, Xiaomi and Bilibili that have access to their own unique user groups and corresponding app publishing platform. (The Western equivalent would be Facebook or Amazon’s app store).

Typically, games launched with these companies are tailored to the specific platform, potentially integrated with a particular SDK or game client. The platform owner is responsible for advertising and other mechanisms to drive installs and usage, again in return for a revenue share.

Although this approach is potentially more complicated and restrictive, it can also be less risky because the game company doesn't need to worry about the cost of user acquisition, as there is already a dedicated audience.

Case study: How Kabam drove higher quality users for 2 major titles in China?

In 2017 Kabam wanted to promote two of its major games - Marvel: Contest of Champions and Transformers: Forged to Fight to mobile gamers in China. Mobvista worked with them to create campaigns for Tencent's GDT Ad Exchange and Tui.qq.com.

Kabam's key goals were to ensure the campaign delivered a boost in game revenues, but also to encourage more existing players to progress through the game.

For the campaign, Mobvista used its strategic relationships with the publishers of some of the most popular apps in China, ensuring a strong supply of premium traffic. We also worked closely with Baidu, Tencent and Alibaba to build a promotional campaign to drive installs and buzz around the games.

The results

By the end of the first week of the campaign, the CPI fell by 40%, thanks to our ability to optimise the campaigns in real-time. This lead to an increase in players making an in-app purchase by over 50%*.

* for select campaigns
Case study: How Featherweight Games released Rodeo Stampede in China?

Rodeo Stampede is an animal collection game with a fun and distinct art style. Since launching in 2016, the game reached no.3 in the free-to-play iOS chart, and became one of the top 10 most popular games overall.

To launch the game in China, Featherweight partnered with Yodo1, the Beijing-based game publisher that’s published games including Transformers: Earth Wars, Rooms Of Doom, Ski Safari, Cut the Rope 2 and Crossy Road.

When it comes to publishing games in China, Sun Ke, the VP of Yodo1 agrees it’s a complicated process.

“Marketing the game really needs to start 3-4 months before the release date. At the same time, the product team needs to make sure the game is fully localized, and all the necessary approvals and permissions have been secured, and the game has integrated with the relevant advertising SDKs. Then, a month before the release, the game's rating and promo materials should be confirmed with each promotional channel. Finally, when everything is ready, the launch needs to be carefully coordinated on the same day.”

According to Ethan Collins, business development manager at Yodo1, Rodeo Stampede was launched across more than 60 Android app stores in this way.
MARKETING YOUR GAME

With an increasing number of non-Chinese developers and publishers wanting to launch games into the Chinese marketplace, the differences between China and other countries are often reduced to differences of language and culture.

In fact, when it comes to launching and promoting games, there is a myriad of other differences that need to be understood. One of the biggest is how the social media landscape in China is dominated by a small number of very large companies. Most people have heard of the two biggest, Baidu and Tencent, but Toutiao, UC Browser and Weibo are also extremely important.

It’s easy to assume that the social media landscape in China is of no difference to how Facebook, Google and Twitter have become the social platforms that we all talk about every day. But in China it is much more complex, as each company offers a multitude of integrated products and services. Whereas Facebook has effectively consolidated social networking through a combination of growth, acquisition and innovation, Chinese social networks have flourished within niches, which means that they often complement each other, leading to much higher fragmentation than in the West. When it comes to launching and promoting mobile games, three companies - Baidu, Alibaba and Tencent - account for around 90% of the programmatic advertising in China.

Tencent is the biggest and most popular. Its primary social platforms are QQ, which started as a messaging and microblogging services, but has grown to include games, video and e-commerce. And WeChat, ostensibly another messaging app, but one that's become ubiquitous throughout China for everything from work emails to the primary form of payment online and in stores. It's no coincidence that Tencent has also become one of the biggest game companies in the world as well.
Instead, **Chinese giants dominate**

BAT Tencent, Alibaba and Baidu & TouTiao accounting
For **77%** of China mobile internet usage time

**The 5 most important channels:**
Tencent, Toutiao, UC Browser, Baidu and Weibo
With a variety of products ranging from social networking, news, entertainment and O2O to cater to the wide-ranging needs of a diverse population of users.

- **Mobile QQ Messenger**: 860M MAUs
- **Tencent News**: 240M MAUs
  - NO.1 News App
- **Tencent Mobile Master**: 200M MAUs
  - NO.1 Security App
- **QQ Music**: 300M MAUs
  - 250M+ daily PV
- **Q-zone**: 670M MAUs
  - 330M Daily PV
  - NO.1 Social Network
- **QQ Browser**: 330M MAUs
  - 37+ mins daily time spend per
- **Tencent Video**: 150M DAUs
  - 70+ mins daily time spend per
- **Ying Yong Bao**: 300M+ DAUs
  - NO.1 Android Distribution Market

Constructing a Multi-traffic and Multi-scene landscape to meet different needs of advertisers.
LOOKING EAST: HOW TO LAUNCH MOBILE GAMES IN CHINA
Guangdiantong is Tencent’s social advertising platform that allows advertisers to reach users of WeChat, QQ and QZone, as well as Tencent’s various apps (don’t forget that Tencent is also China’s most successful app publishers in its own right). QQ is the most popular social platform for younger users, while the profile of a typical WeChat user is slightly older. Of course, most Chinese consumers will have multiple accounts on multiple channels and apps, but you are still looking at a potential reach of 900 million consumers.
A fast and comprehensive information distribution and reading platform dedicated to connecting information with people

A Fast and Comprehensive Information Distribution and Reading Platform

Rank 2nd Of News Apps in China
TouTiao Ad Format Samples

**Full-screen Splash Ad**

Supporting 3 seconds image and 5 seconds video

Buying model: CPM

**Native Ad**

Supporting small picture, big picture, multiple pictures group and video in 10 mins

Buying model: CPT/CPC/CPM
The leading mobile company with the world’s most users third-party mobile browser and other mobile service, acquired by Alibaba in 2014.

- **1.5B** downloads
- **60%+** Market share
- **98mins** Daily time spend per person
- **18+** Daily login time per user
- **500M+** users
- **100M+** DAUs

**UC Toutiao** 100M+ DAU

Fueled by Ali big data system and intelligent algorithm technology to achieve precise audience targeting.

**500M users database**

- UC data
- Alibaba big data system
UC Ad Format Samples

Native ad with Small image

Native ad with 3 image

Native ad with big image
The leading Internet company with the No.1 Chinese search engine and other different types of products to provide people with the best way to find information and connect users with services.

**NO. 1 Search Engine**

- **96.3%** Mobile user penetration
- **75%** Mobile market share
- **100M** DAUs

**NO. 3 Mobile Browser**

- **100M** Topics generation
- **3.5B** Daily PVs
- **300M** MAUs
- **0.13B** MAUs Cover
- **0.65B+** users
Baidu Ad Format Samples

Mobile Baidu App

Baidu Tieba App

Baidu Browser App
The biggest Chinese “open-network” with active information generation and engagement, called as the China’s Twitter

Multiple types of ad formats for users to engage, driving them to converse
Recommended app

Native ad with big image

Native ad with 9 image

Engagement sample

Purchasing sample

Download sample
The Chinese games media

With so much emphasis on different messaging and microblogging apps, it’s easy to forget that China also has its own video games media. As you may guess, several of the most popular sites are owned by the platform owners as well. Nevertheless, for companies that are serious about building a presence in China, it’s worth thinking about how a PR campaign can help to create awareness and buzz for your game. These are some of the most popular sites for games news and reviews.

App Store Optimization (ASO)

App store optimization (ASO) is essentially SEO for mobile apps. Effective ASO is important as it helps you maximize the chance of your app being discovered on the app stores whenever a user searches for something.

Most conventional ASO tools don’t cover the Chinese app stores, so it’s best to use tools that are designed specifically for ASO in China. Luckily, TechNode has a list of the most popular ASO tools. (https://technode.com/2016/08/13/get-apps-discovered-five-chinese-aso-tools/)

Search Engine Optimization (SEO)

In China, Baidu is the most popular search engine in the absence of Google. And just like Google, Baidu offers different ways for brands and companies to use sponsored results and PPC (Pay Per Click) to drive awareness.

With about 80% of all searches done via Baidu, it is even more dominant than Google is in the West. Therefore, if you plan to do any SEO in China, there’s only one search engine you need to care about.
One very effective approach is to use the Baidu Brand Zone. This is a paid-for service that lets you create a branded zone - almost like a micro-web page - that sits at the top of the search results. These can include images, text and video, and gives you the opportunity to dominate the search result page for specific keywords.
"Shuabang" is the practice of using a variety of shady methods to increase the ranking of an app. Typically, companies will offer to boost an app’s ranking by using thousands or even millions of fake app store accounts to download the app, thereby generating a spike in installs. It mostly affects iOS apps, as the Apple app store is the biggest in China, and the fragmented nature of Android games means there is no reliable ranking to manipulate.

It’s become an all-too common method of getting apps into the charts, as it can cost a lot less than a conventional advertising and promotion campaign. For example, it can cost as little as $10,000 to get a game into the top 50 or even the top 20 rankings. You can understand the attraction, as once an app reaches the high rankings it can generate thousands of legitimate installs a day.

While it’s a known issue in China, there’s little so far that has been done to deter companies from offering shuabang services, and plenty of companies continue to use them.

There are some apps which work better with shuabang than others. For example, games which are on-trend or are based on the latest viral meme are likely to get a lot of downloads but be quite short-lived will quickly pay back the investment in shuabang. Also, games that deliver high ARPU work well because the in-app revenues will more than compensate for the shuabang costs once the user base is big enough.

While most companies don’t condone shuabang, there is no doubt he practice has gone mainstream. It seems to be a case of “if you can’t beat them, join them”, with many reputable companies resorting to shuabang to maintain their app rankings.

While it’s not something that we recommend, we think it’s important that you are aware of its widespread use.
Online influencers

We’ve all seen the power of social media influencers grow, thanks to channels like YouTube, Instagram and Twitch. But in China the reach and importance of influencers or ‘KOLs’ - Key Opinion Leaders - is of a whole different magnitude.

China has more than 800 million internet users in China, with the vast majority doing so through their smartphones. And because platforms like WeChat include e-commerce and mobile banking, influencers have been able to build an entire mini-economy based on product endorsements, live-streaming and even their own products and services. Chinese consultancy Analysys International estimated that the Chinese influencer economy was worth over $15.5 billion in 2017.

With 1.4 billion people, the size of audience that even a ‘niche’ influencer can reach is sizeable. The most popular influencers can have several million followers. For example, PapyJiang makes satirical and funny videos and has more than 100 million followers. One of the leading fashion bloggers, Han Huo Huo, has over 3 million followers on his page.

There are some agencies which specialize in working with influencers, and partnering with them - or with a publisher who can do that for you - is undoubtedly the best way to consider influencer campaigns.

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MEASURING THE PERFORMANCE OF YOUR GAME

Without going into huge amounts of detail, every aspect of mobile games these days depends on data, and most importantly, what you do with it. So even though you are trusting your game to a Chinese partner for your launch, you will still need to see how it’s performing, and make changes to improve the performance.

Analyzing in-game player behaviors

It’s possible to track your gameplay, UA campaign spend, IAP and ad revenue through free analytical tools such as GameAnalytics.

Typically, these tools allow you to understand a number of key events within your game which allow you to understand how players are progressing, and whether the game is generating revenues as expected.

The most common aspects of the game to analyze include:

- **IAP monetization**
  This lets you see what your players love buying by tracking all in-app purchases, and use these insights to make more popular and profitable assets.

- **Design events**
  You can track use of reward boxes, characters, skins, outfits, weapons, candies and bubble colors, or pretty much any game design element in your app.

- **Player progression**
  Use progression events to track when a player has started or completed a level, stage, or area, as well as their scores and where they struggle.

- **Virtual currency**
  Measure in-game resources like coins, lives, turns, moves, or anything that can be earned and spent to balance out your in-game economy.

- **Errors**
  Error codes or types can be tracked here, so you can then easily figure out what device, build, or platform they happen on, and debug away.
Case study:
How A/B testing helped Rodeo Stampede choose the right ad format and make higher revenues?

Though Interstitial ads are known for delivering a poorer user experience that can impact on retention and the value of a player, they still represent some 40% of total ad revenue generated by mobile games. They are simple to implement, and are a low cost solution for publishers looking to experiment with their monetization strategy.

Publisher Yodo1 used A/B testing of interstitial ads in the Android version of Rodeo Stampede to analyze user retention and lifetime value of players that were shown ads and players that weren't.

![Basic Data: The Day 2 Retention Rate](image)

1. The Day 2 retention rate of Group A was 36.50%;
2. The Day 2 retention rate of Group B was 39.38%;
3. The Day 2 retention rate of Group A was 7.3% lower than for Group B in terms of ratio.

After 2 days with the app, the number of players who stopped playing the game was higher in the group that was shown the interstitials. This showed that the ads were having a negative effect on retention.
After 7 days, the effect of the advertising was even more pronounced. This suggested that the negative effect of the interstitials increased over time.

1. The Day 7 retention rate of Group A was 7.80%;
2. The Day 7 retention rate of Group B was 8.80%;
3. The Day 7 retention rate of Group A was 11.4% lower than for Group B in terms of ratio.

The overall ARPDAU of Group A was $0.0229, while that of Group B was $0.0087. The former is 164.7% higher than the latter.
This chart shows the average revenue generated by the game. You can see that the group that were shown the ads spent less money than the group that wasn’t. Therefore, not only did the interstitials decrease retention, they also generated a much lower ARPDAU.

By running this kind of test, Yodo1 is able to constantly evaluate and optimize its monetization strategy.

“It’s a complex and long process, but it’s worth it in the long term. “You need to run many tests and try lots of different combinations to find the best result,” said Vincent Diao, VP of Yodo1.

**Data measuring on user acquisition**

You can monitor advertising channels by using third-party statistical tools, such as Adjust, AppsFlyer, TUNE, Kochava, and China’s Talkingdata, and monitor the number and quality of channels through some criteria.

Adjust is the mobile measurement company. Its services portfolio spans across traffic attribution, in-app analytics and app store statistics. Its advertising analytics allow app marketers to reveal the best performing ads, establish a source for each app user and
calculate ROI based on long-term ad campaign performance data. With its app analytics tools users can understand in-app user behavior, monitor a conversion funnel and find ways to grow an app user LTV.

Adjust's dashboard shows real-time data which will be permanently stored and updated every minute without duplicate.

Adjust provides four levels of segmentation data (customers can modify the monitoring link to customize all levels):

**Network->Campaign->Ad group-> Creatives.**

Customers can see advertising spend data of the four levels. Spend data at the device level of each channel can also be displayed based on country, date, region, etc. In addition, customers can view the ROI data of all four levels.

They can also adjust attribution settings, attribution window size, fingerprint attribution, display attribution, and reattribution in the dimensions of app, channel, promotion, and sub-channels.

As for overseas customers entering the Chinese market, Adjust can provide Chinese market solutions that include the following:

**Question 1: Slow and spotty at the Great Firewall**
The well-known "Great Firewall", China's Golden Shield Project, is a consensus station that can block communications with blacklisted websites or specific pages/IP addresses. It will ban
many social websites and filter out contents that contain banned keywords in order to prevent Chinese Internet users from accessing them. This Great Firewall will affect user experience, and users cannot even tell whether it is a real connection problem or restricted problem caused by trying to access prohibited websites. Another effect of the Great Firewall is that it limits the bandwidth available to all external communications, including international applications. This drastically disrupts user experience of international applications, leads to picture and video timeouts, slows down redirects and tracks link speed (even close to zero). This may cause users to never open apps after trying once (this is probably the reason why 37% of Chinese smartphone users claim they open some apps only once), and eventually decrease user retention rate of the application.

Adjust’s solution:
The company established a direct connection with China, featuring dedicated bandwidth, 200-millisecond delay and 100% connection, and 25% faster than other local solutions.

Question 2: How to deal with the Chinese market without Google Play?
In China, Android phones occupy 86% of the smartphone market, but the experience of buying apps is very different from that in the United States and Europe. No single app store has the same coverage and market share as Google Play store. Instead, there are hundreds of smaller app stores in China, each of which has its own promotion networks (many also provide attribution analysis). This is very troublesome for international companies, because having access to each application store requires the corresponding infrastructure, that is, to build (pack) a separate APK for each store, which requires an extra amount of time. In addition to customizing the application for each store, the filtered attribution data will also be dispersed, and all the data cannot be viewed in a single dashboard.

Adjust’s solution:
While supporting attribution analysis of China's mobile devices, Adjust also offers an APK replicator. For international companies (especially those releasing applications both at home and abroad), the separate and one-time SDK integration with Adjust can automatically help build new APKs when it is needed.
Currently, there are three main ways to monetize the game. Paid download and In-app purchase depend more on the choice and setup of developers and publishers, while Ad monetization involves more market participants in both upstream and downstream who build a distinct segmented market, which is a field game developers should focus on. Therefore, we mainly discuss ad monetization here. The content is mainly based on the mobile programmatic interactive advertising platform Mintegral's advertising technology, experience and exploration of ad formats.

Ad formats:
- Rewarded video
- *Playable ads
- *Interactive endcard
- Native Feeds Ads
- Native Interstitial
- Splash Ads
- App Wall
- Offer Wall
More than 300 mobile gaming practitioners from the UK, the US, Canada, Northern Europe, India, China, Japan and South Korea were surveyed on Mobile Games Developer Trends Survey: Autumn 2017 jointly launched by Mobvista and PocketGamer.biz. 25.5% of them are paying attention to better monetization methods, while 30.9% are more concerned about rewarded video ads.

Rewarded video ad is a focus for developers around the world in 2017. This popular form of advertising is not only a good tool for advertisers but also for a monetization tool that brings higher eCPM to developers.
Rewarded Video

Lightning Play™ Video (reward views)

Instant playability of video ads – no buffering or delay
Short 15 to 30 second videos optimized for engagement
Full video production and post production
Example of Game Monetization

Rodeo Stampede's Rewarded Video Ad

Rodeo Stampede is a casual game combining 3D pixels, parkour and simulation. The core gameplay is to nest animals in parkour as a mount and catch animals to expand the zoo, while 5 rewarded video ads are embedded in these two core gameplay. Rodeo Stampede's Rewarded Video Ads are more ingenious than other Parkour games: When a player dies in a game and clicks Resurrection, he can continue to play the game. The next time he dies, he has to watch ads for going on. This will not affect the player's game pace and experience.
Continuing with the trend of 2017, video marketing is still the mainstream form of mobile advertising in 2018. But with the increase of video ads, content requirements are getting higher and higher. Innovative formats of video advertising are emerging one after the other: AR Playable Ads, Panorama Video, Playable Ad and Interactive Endcard.

The examples of Endcard and Playable ad launched by Mintegral Creative Labs are shown above. These two advertising formats’ CTR is 4 times as much as the traditional video ads’; their CVR increase by 1 times in actual ads.
Other mainstream formats of advertising also include but are not limited to: through Rewarded Video Ads:

**Native Feeds**

**Users and Apps Targeted**

Integrated in the experience of app, achieving strong performance

**Native List**

**Customized UI**

**Multi-format ads**
Interstitial
Customizable UI that integrates beautifully in your app with call-to-action

Splash Ads
Immersive full screen display and call-to-action button drive higher ROI.
Mediation platforms

There are various ad monetization and aggregation platforms for game developers, such as Mintegral, Admob, Ironsource, Mopub, Heyzap, Fyber, Appodeal, China's Upltv and yomob and so on.

Ad Formats

Native App Wall

- Customized icon to engage users
- Non-Rewarded List for recommendation

Incentivized Offer Wall

Native credits and customized UI that beautifully integrate with app

Drive more user engagement with reward
SECTION III

INSIGHTS INTO CHINESE MOBILE GAMERS
GameAnalytics:

LOOKING EAST: ANALYZING THE BEHAVIOR & PREFERENCES OF CHINESE GAMERS

It’s great to discuss all these different ways to promote your game and get it into the hands of Chinese mobile gamers - but what about the gamers themselves? Luckily, thanks to the team at GameAnalytics, we are able to see real data from more than 47,000 games on the Chinese app store across more than 8.3 billion events generated by 72 million Chinese gamers. The data we’ve collated gives some insight into when they play games, how long they play for, and what proportion turn into playing users.

Chinese gamers play fewer sessions, but for longer

Chinese gamers play on average one less session per day, with 3.6 sessions per player per day compared to 4.9 in the rest of the world. However, Chinese players spend 48% more time per session, which means that for free to play games with ad-based monetization, higher session times provide more opportunities for players to view and interact with ads.

Fewer Chinese gamers spend money...

When comparing the proportion of free-to-play gamers that converted to paying players, Chinese players were some 20% less likely to convert than players in the rest of the world.
However, the big swings suggest that Chinese players are more volatile, and so may convert at much higher rates during holidays or other events. Plus, with over 700 million smartphone users, there is a much bigger player base to target your game at.

... but they spend money more often

Our research found that the average number of transactions made by Chinese gamers is slightly, but consistently, higher than the rest of the world.

We already know that slightly fewer gamers convert to become paying players, and we also know from the data that the average transaction amount is slightly lower. But it would appear that the higher frequency of transactions means that Chinese gamers prefer games that offer smaller, but more frequent, in-app payments.
Chinese gamers play more games

Stickiness provides a measurement on how engaged players are. As you can see in these charts, only 6-7% of gamers in China typically returned to the same game within 30 days. However, as the weekend got closer this rate increased to almost 11% - suggesting that they have a few trusted games they go back to on weekends, but tend to experiment with many new games the rest of the time.

This creates interesting opportunities to test game design improvements on new players, until their behavior shifts and the game becomes a regular destination for them.
Chinese gamers spend more

When it comes to the amount of money a paying player will spend - also called ARPPU - Chinese gamers spend pretty much the same as everyone else, with the average of both groups around $8.

![ARPPU mean comparison]

However, the big difference is in players that spend more than the average. We found more players from China spent higher than the average ARPPU than the rest of the world.

![ARPDAU in China and rest of the World]

This suggests that targeting this higher spending group may offer a good ROI, both because of the number of these higher spenders, and the fact that high spenders in China tended to spend 11% more than high spenders from elsewhere.
ABOUT REPORT PUBLISHERS,
Mobvista&GameAnalytics

Mobvista is a world-leading mobile marketing platform providing user acquisition and analytics solutions to worldwide performance and brand marketers and developers. As Asia’s largest mobile ad tech company, Mobvista's comprehensive solutions has helped more than 3000 brands to engage consumers across the world.

Mobvista’s campaigns deliver over 10 billion daily ad impressions for its customers thanks to its blend of innovative technology and excellent customer service. Mobvista was listed on the NEEQ (National Equities Exchange and Quotations) in November 2015, with a valuation of nearly $1 billion. Today it has more than 500 employees in 14 offices around the world.

For additional information, visit www.mobvista.com

GameAnalytics

Mobvista-owned GameAnalytics is a popular analytics tool used by indie game developers and successful publishers alike to refine gameplay, improve retention and increase revenue for mobile games. GameAnalytics was founded in 2011 and is headquartered in London, with offices in Copenhagen and Beijing.

With more than 2 billion devices and 40,000+ active games using GameAnalytics, the platform now sees more than 650 million MAU. Some of their users include Hipster Whale (creators of the smash indie hit, Crossy Road), Voodoo, Ketchapp, Yodo1 and Fingersoft. GameAnalytics provides integrations for every major game engine and platform, including Unity3D, Unreal Engine, GameMaker, Corona and more than 10 other services – including a dedicated SDK for Javascript browser games and ability to connect over their REST API. In addition, they offer integrations for popular attribution services, including Appsflyer, Kochava, Fabric.io and Adjust.

For additional information, visit https://gameanalytics.com/
Other free mobile reports by Mobvista & GameAnalytics: