THE STRATEGY GUIDE TO WINNING IN ASIA WITH GAMES LOCALIZATION
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In 2004, Paradox Interactive had a booming hit on their hands with *Hearts of Iron*, an alternate history strategy game that let each player control a nation at the dawn of World War II. But, in the largest gaming market in the world, comprising more than 173 million people, 65 percent of whom are paying, playing gamers, *Hearts of Iron* was banned.

The Chinese market is powerful, but even more powerful is China’s Ministry of Culture which has strict gaming and internet service regulations. Paradox Interactive’s crime wasn’t violence or sex – it was the “alternate history” depicted, in which Manchuria, West Xinjiang and Tibet appeared as independent sovereign countries, the Taiwan Province as a Japanese territory. This was enough to “damage China’s sovereignty...
and territorial integrity” according to the Ministry of Culture. For Paradox Interactive, that spelled “Goodbye” to 112,450,000 gamers.

Hearts of Iron wasn’t the only game to run afoul of governments in Asia that year. Ghost Recon 2 by Red Storm Entertainment missed out on the $2.5 billion dollar South Korean market for three years because it featured a belligerent North Korean general. Relations between North and South Korea are so precarious that South Korea has adopted a policy of not allowing their northerly neighbors to be characterized as aggressive. In 2007, the Games Ratings Board (GRB) acquiesced to local gamer pressure about freedom of speech and now allows games like Ghost Recon 2.

What do these examples have to do with translation? Not a lot. But they have everything to do with successful game localization within Asian markets.

Localizing games is clearly about so much more than translating words. Words require context, and context is often where localization efforts falter. History, religion, culture, and geopolitical perspective are all hurdles game companies must leap in order to reach target markets abroad. And, just as important, are the technical considerations and practicalities of delivering the same quality gaming experience halfway around the world.
In fact, there are 129,200,000 Chinese MMO players. That’s 73% of all Chinese gamers.

There are 173,400,000 million Chinese gamers between the ages of 10 and 50. Of those, 65% spend money on games or within the games themselves.

“There are a lot of moving parts” might describe a Rubik’s cube accurately, but doesn’t even come close to describing what game developers face when going international.

We wrote this book to explain step-by-step what it takes to win, specifically in Asian markets: China, South Korea, Japan, Thailand, Indonesia, Vietnam, Malaysia, Singapore and the Philippines.

When you’re playing to win, we hope this strategy guide helps you leap over traps, beat the monsters, and save the princess - or at least introduce your game to millions of people who will love it.

— The Team at EQHO
INTRODUCTION

THE FOUR ‘ATIONS OF THE ASIAN MARKET:
LOCALIZATION, CULTURALIZATION, INTERNATIONALIZATION, & TRANSLATION

Before we begin talking about the quirks and best practices of games marketing in Asian nations, we need to explain the ‘Ations involved.
Here lie the secrets to success in any market:

**Localization**
The process of modifying an existing game to make it accessible, understandable, and culturally suitable for a target audience.

**Culturalization**
Adapting visuals, audio, scripts and marketing from one culture to another language and culture, so that all pieces are consistent with the expectations, values, outlooks, and vernacular of the second culture (while remaining true to the spirit of the original game).

**Internationalization**
Changes to the game’s code, architecture and user interface that allow for displaying game content in multiple languages and reducing or eliminating elements that might differ by locale.

**Translation**
The act of finding the right words, idioms and expressions in a new language that correspond with the words, idioms and expressions in the original language. That requires not only language proficiency, but cultural fluency.

Together, the Four ‘Ations cover all parts of the localization process, from programming, to developing resource files, to translating and finally testing the game in different geographic locations and on different platforms.

In this Strategy Guide, we explain how to use these tools to present your game – on mobile, PC, or console – to your target market with the best chance of success.

And, we’ll alert you to where (most of) the pitfalls, hazards, and spiky obstacles are for each country: China, Japan, South Korea, Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam.
We’re starting in Southeast Asia precisely because so few people do. You know you want into the South Korea and Japanese markets. And China? That country is the largest gaming nation in the world.

Newzoo estimates that revenues in the Southeast Asian games market will double to $2.2 billion by 2017.

These regions are young – as in the majority of their populations are in the target age ranges for game playing - between 15 to 54 years old.¹ Newzoo also estimates that these countries hold a total of 126 million gamers, 60 million of whom pay for the privilege.
But while it’s tempting to lump these six countries into one group, when it comes to games localization, each nation has unique characteristics. For example, Chinese and Malaysian gamers are indiscriminate about gaming platforms, playing equally often on computers and smart phones, but also using portable gaming devices and consoles. This is a marked difference from nearly every other Asian country.

Singapore’s gaming culture is distinct because of the nearly equal numbers of male to female game players, as well as the country’s age demographics: Singapore is the only Southeast Asian country with more gamers between the ages of 36 to 50 than gamers between the ages of 10 to 20. Either one of these factors are enough to alter a localized marketing strategy significantly.²

## Why Southeast Asia?

WITH A POPULATION OF 548,000,000-34% OF WHOM ARE ONLINE–SOUTHEAST ASIA IS A MARKET THAT CAN'T BE IGNORED.

- **Thailand**
  - $16,800 GDP Per capita
  - Population: 68.1M
  - Online population: 29M

- **Vietnam**
  - $6,400 GDP Per capita
  - Population: 94.4M
  - Online population: 49M

- **Philippines**
  - $7,700 GDP Per capita
  - Population: 103.7M
  - Online population: 54M

- **Malaysia**
  - $27,200 GDP Per capita
  - Population: 30.7M
  - Online population: 21M

- **Singapore**
  - $87,100 GDP Per capita
  - Population: 5.7M
  - Online population: 4.7M

- **Indonesia**
  - $11,700 GDP Per capita
  - Population: 260.5M
  - Online population: 53.2M
But country-specific traits and peculiarities in gaming cultures aren’t the only potential pitfalls that await the unwary game developer.

Conversions, Conversations, and Finding the Right Words

When localizing a game whether in Southeast Asia or China, Japan and South Korea, you may be surprised at the low levels of English proficiency. According to the English Proficiency Index, Malaysia and Singapore are the only two to score “high proficiency,” with the rest trailing behind. What this means for globalizing game developers is this: You can’t expect your foreign audience to speak your language, understand your culture, or even appreciate your game titles, unless you translate them.

How does English language proficiency affect conversions & sales?

Ability in English determines how much time users spend on English language websites. Time spent on websites directly correlates with the likelihood of purchasing. More time on sites also leads to greater engagement, which is vitally important for the longevity and profitability of subscription games.

Side note: In Tokyo, English language proficiency is expected to improve somewhat since there is a huge push to improve English skills before the Tokyo Olympics in 2020. But even a common language can’t quite bridge the gap between Western and Eastern cultures, which is why the best translation services translate more than words – they recreate experiences.

Access Issues

When entering into new markets, it’s natural to make some assumptions. It’s natural, for example, to assume that just about everyone has internet access, or smart phones. But internet penetration, bandwidth and latency differ widely between places like South Korea (where internet speeds are generally lightning-quick) and parts of the Philippines where the internet may be relatively new. In fact, between 2004 and 2014, internet access grew by more than 800 percent in the Philippines, the fastest in all of Southeast Asia, and internet penetration is currently just above 52 percent.

Smart phone penetration is much more advanced – nearly everyone within the target gaming demographic has an internet-connected mobile device. Newzoo predicts “explosive” growth for mobile games in Asian markets, which is expected to become the largest revenue segment for games by 2017.

However, to tap into the international mobile market, mobile games will need to work seamlessly on a wider array of mobile platforms (not just on iOS and Android). Smaller local mobile manufacturers and providers can take up surprisingly large market segments in the Big Six, which makes testing across the most popular devices in target geographic regions imperative for widespread success.
Deciding Where and What to Sell

When deciding which games to localize, consider what is most likely to appeal to your target location by learning about the most popular platforms and game genres, as well as the average spend on games per consumer.

For example, while console games dominate the U.S. market, they make up only 2 percent of China’s gaming market. However, PC, MMO and casual web games make up 68 percent of China’s market. You’ll want to look at cross-over opportunities as well.

Did you know that 60 percent of people who spend large amounts of money on mobile games in China also spend significant amounts of money on PC games?

Of course, you’ll want to do in-depth research into any new location, but here’s a cheat-sheet of key facts per country to get you started.

1. CIA The World Factbook
2. NewZoo SEA Report 2015
3. English Proficiency Index
China

Number of gamers (est.). 558.5M
Annual Spend Per Player $122
2016 Game Revenues $24.4Bn
Most Popular Game Genre MMO (PC)

Upcoming opportunities: The mobile gaming industry in China will make up an even larger portion of digital gaming revenue in 2017, at 63%, whereas their PC gaming industry has declined. Casual gamers (mobile gamers) are entering the market in droves, and China has won a reputation for being #1 in the world for MMO games on PC. However, Western games face stiff competition from locally produced games. Recently, China lifted its ban on console games, which has caused console developers to swoop in for market share.

Japan

Number of gamers (est.). 69M
Annual Spend Per Player $296
2016 Game Revenues $12.4Bn
Most Popular Game Genre PUZZLES, STRATEGY + RGP (MOBILE)

Upcoming opportunities: The Japanese gaming market is dominated by local publishers, but the boom in mobile and social gaming revenues within the last few years still makes it a tempting market for foreign developers. Around half of Japan’s $12 billion dollar games revenues are due to smartphone spending. Console games are a tough sell, as Xbox and PS4 recently discovered, but on the bring side, Japan’s console gaming market is mature and stable (some would even argue stagnant).
South Korea

Number of gamers (est.). 25.6M
Annual Spend Per Player $290
2016 Game Revenues $4.2Bn
Most Popular Game Genre MMO (PC)

Upcoming opportunities: Mobile gaming is a leading trend, particularly among younger gamers, mostly due to a popular messaging app which became a gaming platform. For the PC gaming market, women make up half of the audience (whereas in China and Japan, only a third of PC gamers are women).

Indonesia

Number of gamers (est.). 43M
Annual Spend Per Player $13
2016 Game Revenues $841.1M
Most Popular Game Genre Strategy (Mobile)

Upcoming opportunities: Indonesia has been described as the “fastest growing market for games in Southeast Asia” by Tech in Asia.com, and currently has the largest online population in the region even though only 40 percent of Indonesians have internet access – the lowest penetration rate in Southeast Asia. Indonesian gamers gravitate toward Western games, especially strategy games.
Malaysia

Upcoming opportunities: Nearly all Malaysian gamers split their time between PC games and mobile games, but around half also play on handheld devices and consoles. Of all the Asian countries, they're the least discriminating about platforms. They're the most mobile-friendly with the highest mobile penetration in Southeast Asia. And, 74 percent of Malaysians play games on their phones.

Philippines

Upcoming opportunities: Internet penetration has grown by more than 800 percent in the last 10 years thanks to smart phones, creating new opportunities by the day, especially for Western games (which make up 65 percent of the top games in the Philippines). In terms of gaming culture, Filipino gamers would rather play with friends than solo, making MMO and LAN games more popular.
Singapore

Number of gamers (est.). 2.9M
Annual Spend Per Player $208
2016 Game Revenues $241M
Most Popular Game Genre Strategy+Action/Adventure (Mobile)

Upcoming opportunities: Singapore is the only country in Southeast Asia with more older gamers (36 to 50 years is the largest segment of gamers), and gamer gender is split almost 50/50. The country has the lowest percentage of paying mobile gamers (29%), but those who do spend money spend the most out of all Southeast Asian countries across all platforms.

Thailand

Number of gamers (est.). 17.2M
Annual Spend Per Player $35
2016 Game Revenues $336M
Most Popular Game Genre Racing Games (Mobile)

Upcoming opportunities: Thailand boasts the highest game revenues in Southeast Asia and those revenues are only expected to grow. Mobile games make up 31 percent of that revenue currently, but are also expected to grow to more than half of all game revenues for the country by 2017.
Vietnam

Number of gamers (est.). 33.9M
Annual Spend Per Player $16
2016 Game Revenues $217M
Most Popular Game Genre Racing Games (Mobile)

Upcoming opportunities: Mobile games have the most players in Vietnam, even though smartphone games only account for 18 percent of game revenues in the country. However, mobile and tablet gaming are expected to grow to more than 50 percent of game revenues by 2017.

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PC magazine Overview:
Gaming in the Philippines
EuroGamer
A few years ago, the developer behind a popular baseball video game in Japan wanted to enter the U.S. market. The baseball game’s concept centered around a famous tournament in Japan that pits the country’s top high school baseball teams against each other, and each team name in the game was the name of a real high school in Japan. Not only were these names mostly unpronounceable by non-Japanese speakers, they had no relevance outside the country - to the average Western gamer, the team names were random.
However, the translator in charge suggested localizing the team names by re-naming them with false city names that sounded like they might exist in small-town America.

And with that, the game made sense again.

When games translation is at its best, the word-for-word translation isn’t nearly as important as creating something that feels familiar and natural to your target audience. And this is where localization and culturalization come into play.

Here is how they work together.

**Localization – The Grand Tour**

The localization process of a video game typically has 7 stages:

1. **Familiarization** – In which translators, editors and project coordinators familiarize themselves with the product (and yes, that means playing the game!). In games localization, translators who are not only native speakers, but also native game players, offer priceless perspectives. Some developers want to skip this step, which is possible, but far from best practice. When you truly want to optimize the user experience, you have to let your translation team use the game!

2. **Glossary & style guide development** – In which the game development team provides the translators with their source language style guide and list of common terms (including pronunciations) so the translation team can model theirs on these samples.

The style guide will list all spelling, grammar and punctuation rules for the game title, as well as explanations of how each character should sound (speech impediments, accents – including region, time-period, high or low language, etc.). Glossaries and style guides ensure consistency for the current game and any future sequels.

3. **Translation** – The translation process includes the actual translation, followed by editing and proofreading to ensure consistency. If time allows, it’s also best to build a pre-integration step into the process to let translators see their text on the game screen prior to the linguistic testing stage. This step helps them catch text length issues, audio timing mismatches, and polish the language to sound even more natural.

When games translation is at its best, the word-for-word translation isn’t nearly as important as creating something that feels familiar and natural to your target audience.
4. Voiceover work and audio file organization
   - For games that include audio, the recording script should be translated first to allow time for sourcing talent and recording the audio. Any experienced audio localization partner should also be able to use one voice artist to cover multiple game characters in order to reduce the total number of actors required. Additional time will also be needed at the end of the project to add new lines or to fix audio bugs.
   
   Note: Localizing may mean that the voice actor’s tone of voice and diction may need to change to reflect local tastes. For example, Asian language cultures tend to prefer higher-pitched female voices than Western audiences. For large, audio-heavy blockbuster games, it’s vitally important to have systems in place (like versioning software) to organize dozens or hundreds of characters, vast numbers of source files, target files and retakes.

5. Testing for quality and UX
   - When it comes time to test the nearly-finished product, you not only need translators fluent in both the target language and culture, you also need gamers! This stage usually results in a number of changes to iron out bugs, test audio, ensure the text runs an appropriate length, and optimize the user experience for typical gameplay.

6. Testing for geographic compatibility
   - Geographic compatibility comes down to this: How easily can your target audience, in your target location, play your game? Factors include the game’s compatibility with popular devices, internet loading time, 3G and 4G compatibility and reliability, in-game purchasing, and any other hardware or software-related issues that could adversely affect gameplay.

7. Sign-off & release
   - The translator’s job doesn’t end with the sign-off of the game; there are still promotional materials, landing pages, videos, microsites, strategy guides and other corollary materials to translate.

Culturalization – The Art of Fitting In

Culturalization goes a step further than localization by looking into a game’s fundamental assumptions and making changes as needed to deliver the same experience of the game in ways that feel familiar and natural to the target audience. Your translation provider will, ideally, consider your game’s storyline and characters within the context of the values, beliefs and perspectives of your target audience, and suggest ways in which your game can overcome any cultural mismatches.

But, if that always happened, we wouldn’t have stories of games being dropped from the Chinese market for geographic differences of opinion.
The 4 Game-Overs of Culturalization

When approaching culturalization, there are four major potential pitfalls to consider: history, beliefs, cultural/ethnic friction, and geopolitical perspectives. Run afoul of any of these, and your game might well be banned from the most sensitive markets.

History

Victors may write history, but rewrites may be in order before that history is presented to foreign markets. Past events are among the most sensitive topics when entering into foreign markets since most (especially non-Western) cultures are very protective of their historical legacies.

Cultural/Ethnic Friction

Ethnic conflicts in Asia abound (at least 24 ethnic minority groups with potential for conflict have been identified in Southeast Asia alone). But mostly, conflicts arise when there are ethnic or cultural stereotypes within games, or plot points that reinforce negative bias toward specific groups.
When entering into markets with strict religious codes, any problematic content can cause a backlash. Consider the dominant religions of your target audience. In Indonesia, Malaysia and the Southern Philippines, Islam is the most widely practiced religion; in Thailand, Vietnam and Singapore, it's Buddhism; Christianity and Catholicism in Philippines and eastern Indonesia and East Malaysia.

Wars are generally fought over three things: Religion, resources, and land. Geopolitical problems arise from the latter as nations vehemently defend their borders and geopolitical perspectives. Usually, these issues result from a nation claiming a territory and requiring that territory be shown as part of their nation in game world maps.

Culturalization isn’t just about identifying potential conflicts - it can also be about finding opportunities. One approach to culturalization is simply to make the content understandable; another is to revise the game to avoid any potential conflicts with the target market; but the highest form of culturalization is that which makes the game content even more meaningful for players in the new location, possibly by including geography-specific elements.
How to find out which issues may affect your game:

Build culturalization into the development cycle. As you’re developing a new game, consider the perspectives of different cultures, ethnicities and religions, and incorporate diversity and sensitivity from the beginning (or don’t – but don’t be surprised when there’s backlash!).

Gain awareness of your target culture by asking questions. Request that your translators alert you of any potentially offensive material or content that doesn’t carry the same nuances or connotations in the new language that it did in the original (another reason why in-country, native translators are valuable resources!).

Use in-country translators familiar with the gaming culture of your target audience. Some cultures are more apt to shrug off material that doesn’t match up with their belief systems; others become militant; most are in between. But, even if the gamers in your target location aren’t sensitive to cultural differences, you’ll still want to tread lightly – it’s not the players but their governments, religious leaders and parents who often lead the charge against “offensive” content.

Decide between deal-breakers and “reasonable risks.” Remember: you don’t have to change anything about your game. Any changes are at your discretion, though many developers are willing to alter potentially offensive material so their games appeal to wider audiences.
Internationalization is the technical foundation that underlies localization. It includes developing code, architecture, and user interfaces capable of processing and displaying multi-lingual game content – the entire framework on which translation rests.

Many of the issues that concern internationalization are related to the spacing of text characters. European languages usually take up more physical space than compact Asian language characters, which can make text boxes look odd enough to distract from gameplay.
Text-related internationalization includes:

• Font display systems that allow for kerning (different spacing between letters), since the fixed-width characters of many Asian languages can cause difficulties when translated to or from proportional fonts.

• Font selection to ensure that the font contains all the letters or characters required.

• Font size and type selection to optimize readability and appeal.

• Creating flexible, auto-resized text boxes that expand and contract as needed for the letters/characters involved.

• Subtitle display, font and positioning.

• Internationalization also covers organizing asset management systems for the tools translators need to ensure efficiency and consistency, including: Computer Aided Translation tools, Translation Memory tools, terminology glossaries or TermBases, file comparison or versioning tools, and automated language QA.
Hazard: Hard coding. “Hard coding” text within your program means that a programmer will have to go in and fix each string by hand every time (rather than have a system automate the process at build time). If that weren’t bad enough, the programmer would also have to separate the text to be translated from the program source, and then input it again by hand. But wait – it could get worse! You could send your translators the source code, have them hunt for text to be translated, and risk them accidentally changing the programming code.

Instead of hard coding, you’ll want to externalize translatable text strings – essentially isolating all text strings used in the game into a resource file for each language.
**Shortcut: ISO codes.** Use ISO language codes to mark every asset intended for a particular region.

**Shortcut: Formatting.** If it’s possible to put all files in similar formats, there will be less chance of error and less work involved to convert and re-convert files.

**Shortcut: UTF-8.** Incorporating UTF-8 character encoding into your game development makes it easier to convert text into Asian languages later. You can use UTF-8 for any language, or multiple languages at once, without having to worry about managing multiple encodings.¹

**Shortcut: XML or XLIFF.** XML is an alternative to plain text files and Excel tables (which are frequently used for translations) that makes it easier to access multiple versions of the same language string. For example, some languages only need one version of a string, but other languages require more versions of that same string because of singular/plural or masculine/feminine/neutral grammar structures. By using XML tags to allow for both cases, you can translate multiple versions of the same string at once. XLIFF (the XML Localization Interchange File Format) makes the job of your translators even easier – but it does require processing text resources from their native formats into the XLIFF schema for translation requests.

**Shortcut: Date, Time, Currency.** Month, Day, Year? Day, month, year? Year, month, day? It seems like every country has its own method for tackling dates, time, and currencies. Details like this can slow you down, unless you discuss them with your localization teams before game production gets underway.

¹ UTF-8: The Secret of Character Encoding
What can you expect with your first game localization project? Here’s a step-by-step guide of best practices.
**STEP 1:**  
You decide the parameters of the project, including platforms, languages, project budget and release date.

**STEP 2:**  
Choose your translation provider wisely. Some localization companies only offer a few services, like translation and linguistic testing. Others offer a full complement of services ranging from localization, culturalization, internationalization and translation, all the way to project managing voiceover work and testing the game in multiple locations and platforms. Full-service is, of course, helpful, especially when dealing with less familiar markets. But also look for companies that have established working relationships in the locations you want to reach. Positive, long-standing relationships are key to successfully breaking in to most Asian markets. Most importantly, however, is finding a company who not only offers talented translators, but also translators who play and enjoy games.

**STEP 3:**  
Hand your translation provider the keys to the kingdom. This is when the familiarization process begins for your translation team. Each of your translators will actually play through the game, making notes as they go and familiarizing themselves with the game’s context and content. Not only will you need to send the game, but also all related audio files, language files, style guides, glossaries, dictionaries, and any other tool your development team used to ensure consistency. Don’t forget to include detailed notes on how characters should sound.

**STEP 4:**  
Translation begins with formalizing a style guide and terminology glossaries using tools to ensure consistent use of key terminology throughout the game text. If audio/voiceover work is required, translating the audio script should take priority to give the casting director time to assemble actors.

**STEP 5:**  
Voiceover management begins with preparing the translated script, followed by contacting a casting director to fill each role (keeping local preferences in mind). In addition to the initial recording sessions, voiceover recording updates will be scheduled for after the game translation has been completed to cover any additional dialogue or any changes that need to be made.
After the testing phase, final takes may be necessary once the game has been experienced in the context of its final output. *Note:* Working with professional actors who can perform multiple voices and characters can cut down on time and cost, as can using voice modulation effects to manipulate voice pitch.

**STEP 6:**

The testing and bug fixing process should include:
- User experience testing by linguist gamers
- Proofing for cultural, historical, ethnic or geopolitical red flags
- Functionality testing in different environments, and on different platforms or devices
- Testing in each target geographic location to ensure compatibility with local internet service and other location-specific UX factors
- Final translation adjustments and voiceover retakes
- Regression testing

**STEP 7:**

Project completion, followed by translation of marketing and associated materials.

What does “full service” mean? For us, it means having all of the necessary in-house departments required for games localization, including:
- Linguistics
- Engineering
- Voiceover studios
- Multimedia
- Testing
- Substantial SEA language experience (we have 20+ years)
- Established in-country partners and resources in each target market
- Consultation (market prioritization, localization best practices)

Final Rounds

After the project is finished, it’s best to take the time to review how it went. Give high-fives for everything that went well (we contend that praise makes future translations that much better!), but this is also the best time to work out strategies and solutions for anything that didn’t work, or could have worked better. Games have updates, re-releases, and additional content – not to mention sequels – and taking notes for next time is always a good investment.
MOBILE GAMING ON THE MOVE: CHALLENGES OF CASUAL GAMING LOCALIZATION

Mobile gaming will generate $46.1 billion in 2017, or 42% of all global game revenues. Newzoo expected the growth will continue toward $14.6 billion in 2017 for China alone, and numbers of users are rising quickly. Here are a few more vital statistics on the Asian mobile gaming front:

Android phones are far more popular than iPhones. In China, for instance, Android devices have a 73.6 percent market share, which is more than twice that of iOS devices.
Thailand and Philippines love their Apple and Samsung phones nearly equally, with Huawei a close third. However, inexpensive local brands are common too.

Indonesia, Cambodia, Vietnam, and Malaysia sit solidly on the Samsung fan wagon.

Asia’s Big Three are among the five largest for both iPhone and Android mobile games markets in the world. Though China’s dominance is a result of the nearly 1 billion monthly active users playing on mobile, Japan and Korea solidify their places in the top five by boasting big spenders: among players who made in-game purchases in 2016, Koreans spent almost $60 in an average month while Japanese spenders shelled out $70. The other three top markets came in well below, with spenders in the U.S. and China paying about $25 a month and Brits paying just over $30.

The Tempting, Yet Perilous Japanese Mobile Games Market

“The largest mobile games market in the world” sounds awfully tempting, doesn’t it? It’s like the Wonka Factory to a chocoholic, or Comicon to a Joss Whedon fan. It’s true, the Japanese love their mobile games. Step on any train platform in Tokyo, and you’ll see well-heeled young professionals furiously tapping at their phones (and odds are, they’re playing Monster Strike). What could be dangerous about introducing your game into such a welcoming country?

Here be dragons! Specifically, a game called Puzzle & Dragons, which along with Monster Strike runs an effective duopoly on Japanese mobile gaming spending. Yes, Japanese gamers have been estimated to spend a whopping $65 a month on their mobile games, but 70 to 80 percent of that money went to either Dragons or Monsters. Between 2001 and 2013, not one foreign-made video game title broke the top 100 in Japan.

Which brings us to our new vocabulary term: “yoge kusoge” – or, “foreign games are crap.” That’s a loose translation of an idea that has pervaded the Japanese games market. It’s up for debate whether this attitude is changing – from what we’ve observed, well-localized Western games are in demand, at least in consoles and PCs. But the mobile market? It’s a tough one.

According to Kantan Games analyst Serkan Toto, at the Casual Connect Asia conference in Singapore in May 2015, the mobile game developers with the best chance at breaking into the Japanese market are those with big marketing budgets, an innovative concept, high production values, a tightly targeted niche, a local publisher, and a strategy to generate decent revenues with few players.

But then there is the siren’s call of statistics, like “In Japan, each downloaded game earns three times the global average on Apple Devices and six times the world-wide norm on Android devices, according to App Annie.”
From there, you’ll need to master the finer points of what makes each country’s mobile players tick – or tap, as the case may be.

Japanese players expect in-game social interaction, like combat between guilds.

South Korean gamers have come to expect frequent game updates and special in-game events.

China has more than 15 app stores – which is a significant change from just dealing with two (Apple and Google’s) – as well as networks selling games, and middlemen at telecom companies and hardware manufacturers.

In general, Asian gamers are better conditioned for more complicated games than Western audiences – your game might be too simple for them. There’s a reason Angry Birds took off in the U.S. and not so much in Japan!

### Challenges to entering the mobile gaming market abroad

Breaking into other Asian mobile games markets isn’t a cakewalk either. While some games, like *Clash of Clans*, enjoy multi-year runs of wild popularity, they are the exception rather than the rule. Most mobile games release quickly, gain popularity fast, and fade away to make room for the next game just as quickly. Time is of the essence, but there’s good news: Since mobile games usually rely on action-oriented gameplay with simpler graphics, fewer text and character restrictions, and little or no voiceover work, they don’t take very long to localize!

That’s a good thing, because to stay on top of the market, you have to come in already localized with a system in place for simultaneous delivery (which a full-service localization company can facilitate). You’ll also need a local partner for distribution and/or monetization.

1. Venturebeat: Why Japan’s lucrative mobile gaming market isn’t great for foreign developers
2. The Wall Street Journal, How Japan is Winning in Mobile Games, 12/11/2013
PLAYING TO WIN

The world called – can you come out to play?

Yes, there are a lot of moving pieces when it comes to successfully marketing a game in another culture and in another language. There’s project management, engineering, translation, voiceover, multimedia integration, testing – and most importantly, making the minor changes necessary to deliver the same experience so that players on the other side of the world will love the game every bit as much as its home country.

Don’t worry – no game developer does this alone. They find partners who have done this all before with spectacular results.

We hope this eBook gives you the background and vocabulary to ask the right questions of your potential localization partners so you can find the right fit for you. But, without tooting our own horn too much, we’d like to leave you with one last piece of advice:

Choose a localization partner that loves games as much as you do.

That passion translates into every language.
Want to know more? Let’s talk.

Get in touch with our games localization specialist to find out how EQHO can help you get more out of your multilingual gaming strategy.

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