

By The Book?

Western Developer Perceptions of China's PC Games Market

August 2026

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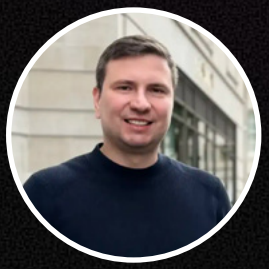


Foreword

China's immense player base and multi-billion-dollar revenue come as no surprise to the games industry. I regularly speak with studio executives who look at China with a mix of desire and confusion. So we commissioned this report to measure the sentiment, strategies, and friction points Western development teams have towards the region.

The world's biggest gaming market comes with its own regulatory requirements, cultural considerations, and purchasing habits. At the center of China's games industry sits the notorious ISBN (International Standard Book Number): a government-issued license required to distribute games on major gaming platforms. But unlike the ISBN's literary namesake, studios need not go 'by the book' to reach players in China. There's a network of distribution routes and marketing channels that all operate around the major platforms.

To understand how the Western games industry is approaching China, we surveyed 300 senior PC and console developers across the UK and the US. This is your executive guide to how Western studios are analyzing, entering, and scaling within the Chinese market, combined with Rokky's insights on how developers can best reach this giant of a region.



Vadim Andreev
CEO and Co-Founder,
Rokky

Key Findings

80%

of game developers plan to release a game in China in the next two years

Increased unit sales are the biggest opportunity of China distribution, cited by

70%

of developers

43%

of developers cite partnership barriers and complex regulations as the main barriers for distribution in China

Only

44%

of developers can accurately describe 'WeGame'

Developers believe players primarily buy games through official, regulated Chinese storefronts, cited by

59%

of developers

87%

of developers believe an ISBN license is required to distribute a game in China

45%

of developers believe a local Chinese partner is mandatory for distribution

31%

of developers believe 'Local Chinese Gaming forums' are the most effective marketing channel

Audience Research

300

PC and console game developers surveyed.

Respondents are evenly split geographically, with

150

from the US and

150

from the UK

100%

of respondents operate at manager level or above.

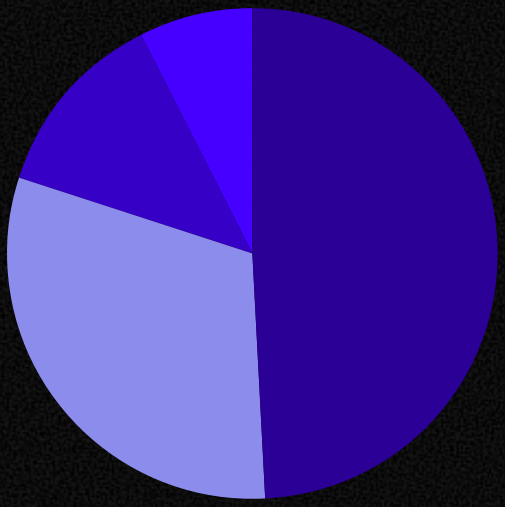
78%

of respondents hold senior manager or C-suite positions.

Why China?

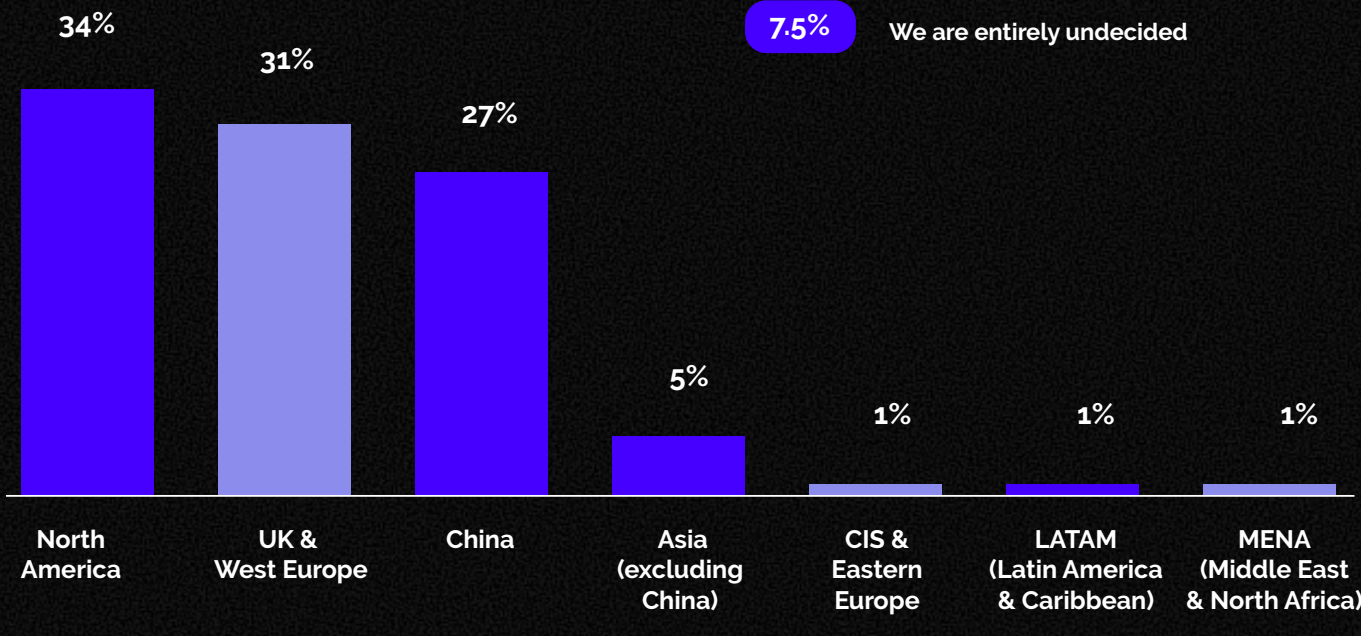
China's games market is immense. The latest Chinese Video Games Market Report from Niko Partners shows that the country is home to 722 million gamers, with total player spending estimated at more than $50 billion in 2025. With a player audience double the size of the United States, it's no surprise that studios are planning to release their next title in China:

Do you plan to launch a current or future title in China in the next two years?



- 49.5% Yes, and my studio has launched a title in China within the last 5 years
- 30.5% Yes, and my studio has not launched a title in China within the last 5 years
- 12.5% No, we are not currently considering it
- 7.5% We are entirely undecided

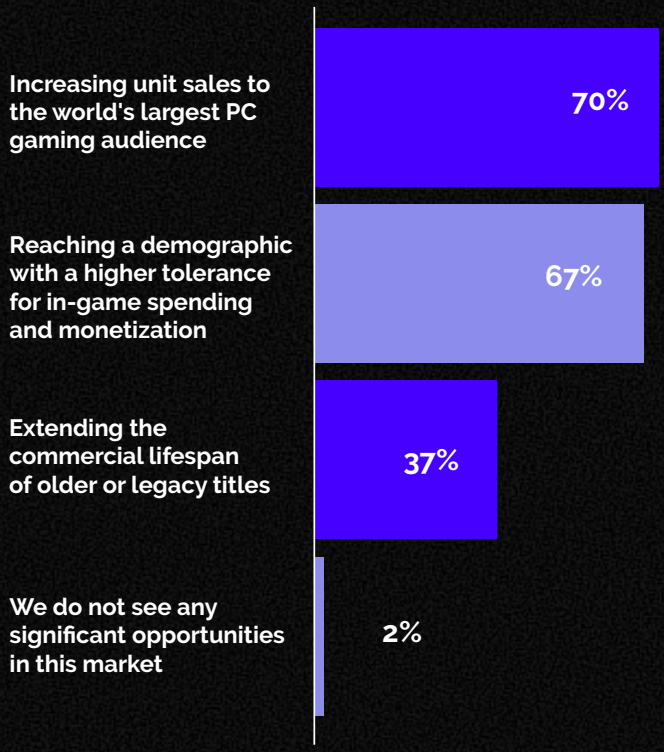
Which of these markets will you prioritise in your next game launch?



When developers are asked to choose their primary market for their next launch, it's perhaps unsurprising that North America **(34%)** and the UK and West Europe **(31%)** take the top two places. However, China takes a close third, with **27%** of respondents selecting the region as their biggest priority for launching a game.

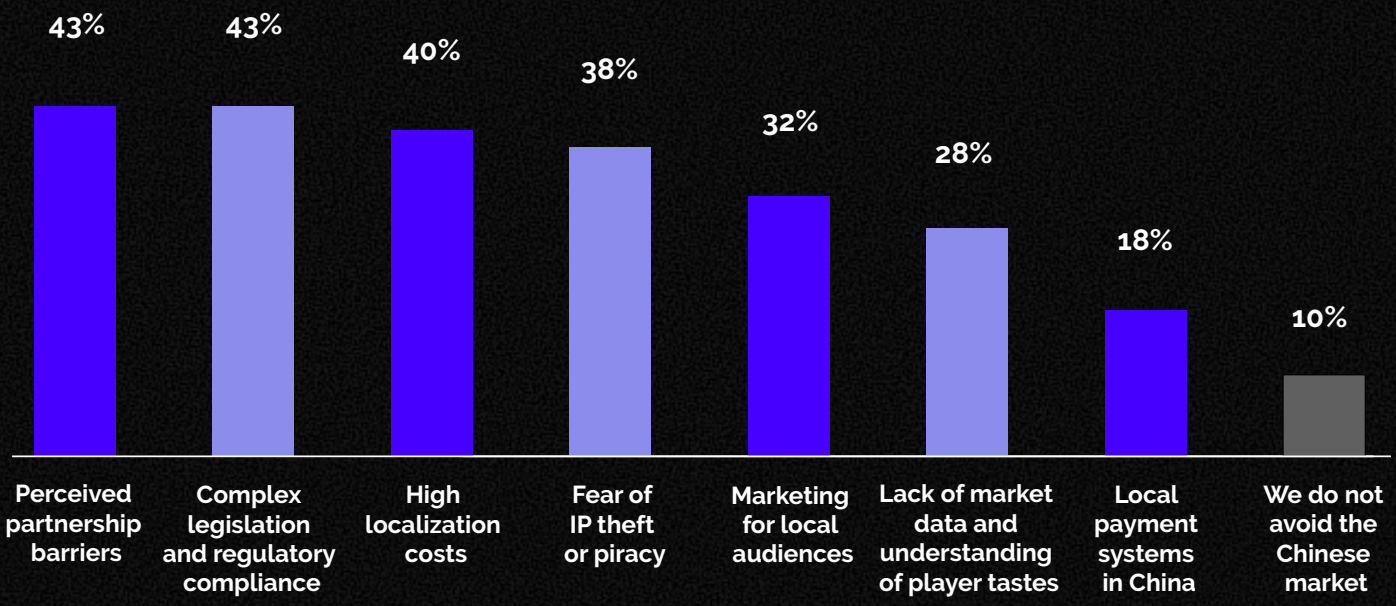
The primary driver for releasing games in China is unsurprising: sheer unit sales. **70%** of surveyed executives point to increasing unit sales to the world's largest PC gaming audience as the biggest opportunity from eastward expansion. Monetization mechanics also play a heavy role in this strategic focus. The survey reveals that **67%** of developers view the Chinese gaming demographic as possessing a higher tolerance for in-game spending and microtransactions. Additionally, **37%** of respondents see the market as an avenue for extending the commercial lifespan of older or legacy titles. It's clear that developers see China's potential both for new global launches and a market that gives new life to games already proving successful in the West.

What are the biggest opportunities your studio sees when distributing to China?





What are the biggest hesitations your studio sees when distributing to China?



Despite the financial incentives, the perceived barriers to entry remain imposing. As highlighted above, **43%** of those surveyed point to partnership barriers as their primary roadblock, while an equal **43%** consider dense legislation and regulatory processes to be the main barrier. Another **40%** are concerned about high localization costs, while **38%** are primarily worried about IP theft or piracy.



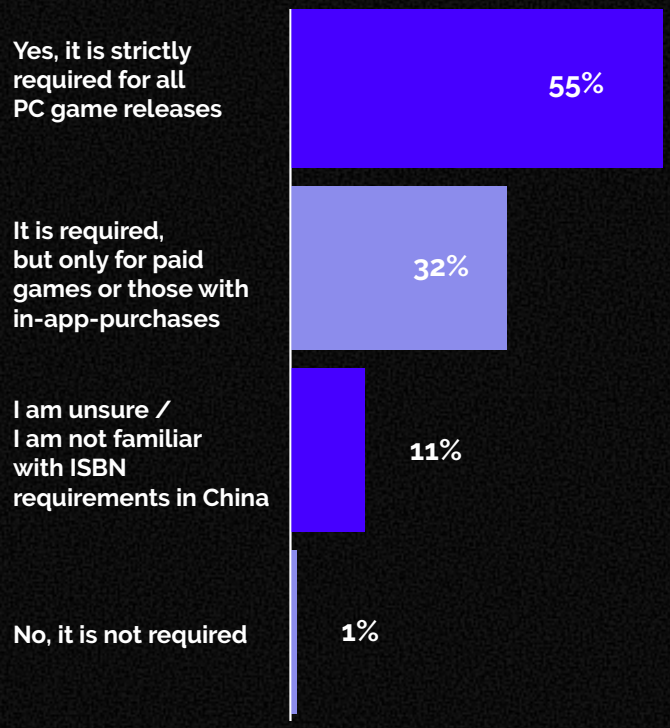
ISBN License and Partnerships

The rules and regulations for releasing games in China are famously demanding, shown in no small part by legislation and regulatory processes cited as the main barrier to entry. The ISBN (International Standard Book Number) license sits at the center of game regulation, required by the National Press and Publication Administration to legally distribute, operate, and monetize a game on official domestic platforms.

Those platforms include the likes of 'Zhengqi Pingtai', the official Chinese version of Steam, operated by Valve and Perfect World, alongside Tencent's 'WeGame', a direct competitor to Valve's local offering. Both platforms, whose games require strict ISBN approval, have steadily grown their local catalog, with 'WeGame' featuring ~1433 games and 'Zhengqi Pingtai' housing **536 in 2026**. But that is a mere drop in the ocean compared to the **130,000+ titles available on the global version** of Steam.

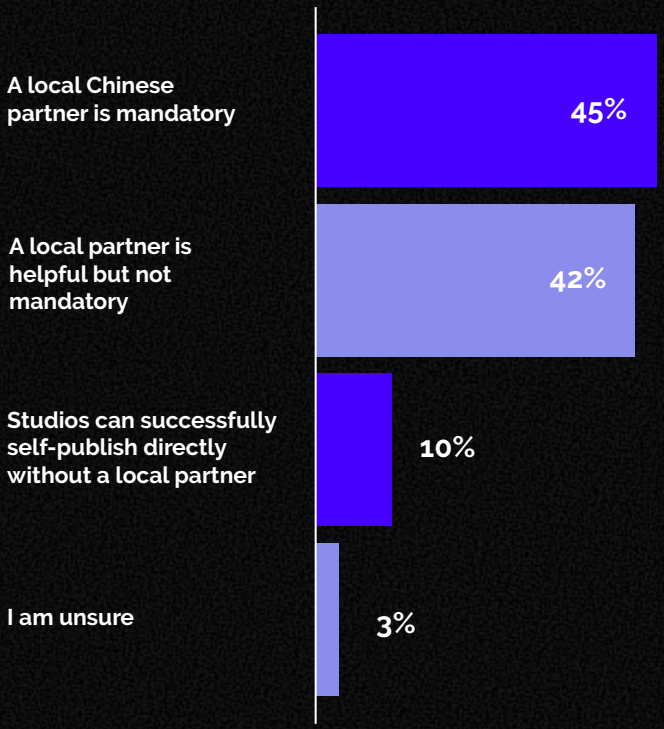
According to **Niko Partners**, in the first half of 2026, 754 domestic games and 25 imported games were awarded an ISBN; a licensing requirement most developers in our study are aware of...

To the best of your knowledge, is an ISBN license required to distribute a game in China?



ISBN licenses are typically secured by international studios partnering with a Chinese publisher with an established operating history in the region, with publishers such as NetEase, Yodo1, or MyGamez all offering services to assist Western developers with ISBN approval. Developers clearly see local partnerships as valuable, even essential: **45%** of respondents believe a local Chinese partner is mandatory for distribution. Another **42%** view securing a local partner as helpful, though not mandatory.

Which of the following best describes your view on distributing games in the Chinese PC market?





Platforms, Vpns, Speed Boosters, and Blindspots

There are two primary routes to reach players in China: direct distribution to officially regulated platforms such as WeGame, and additional distribution in which games are sold to players on e-stores who activate a VPN or Speed Booster before redeeming the title on global Steam.

Direct Distribution

- Players purchase the game on the WeGame store
- The game is available on the WeGame account for the player to enjoy
  no keys required

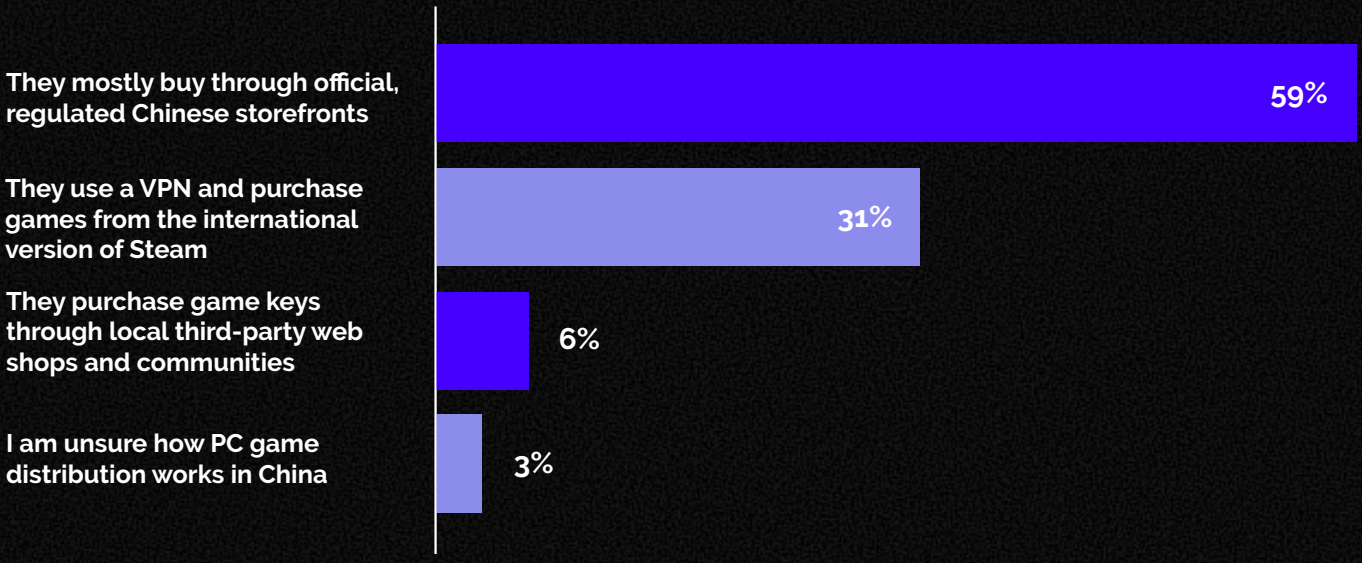
Seamless experience | No extra steps

Additional Distribution

- Players use a browser to purchase a Steam key through an e-store
- Players activate a VPN or Speed Booster
- Players redeem the key on the global version of Steam
- Players enjoy the title on the global version of Steam

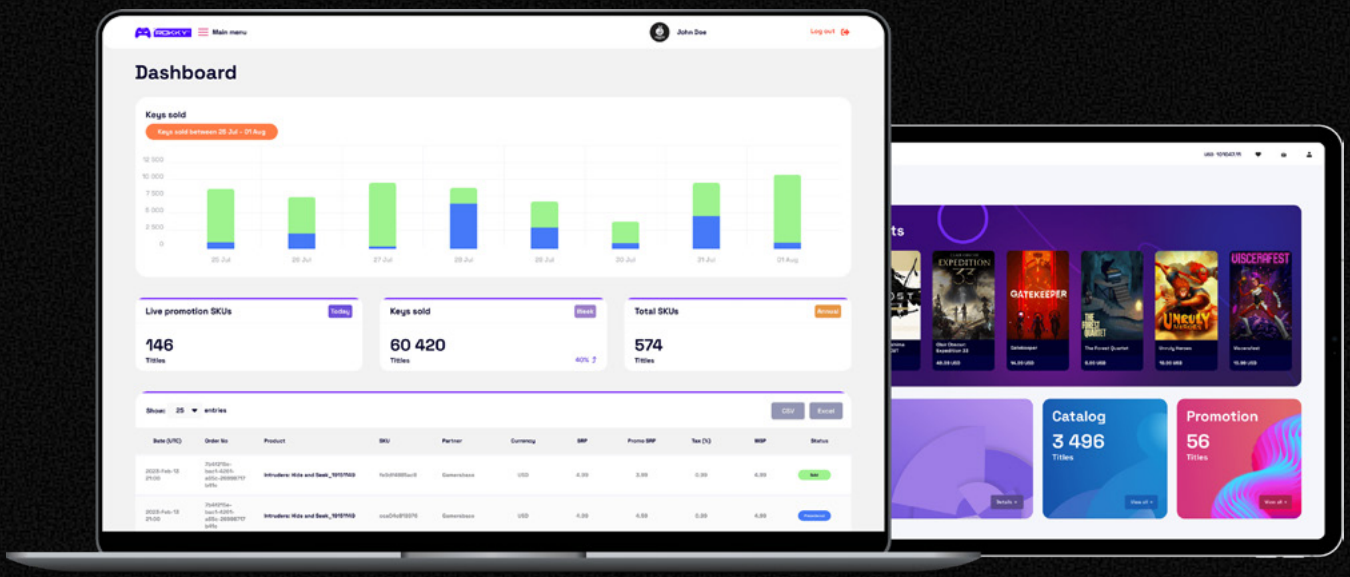
	Direct Distribution	Additional Distribution
Games Purchased On	Games purchased and redeemed directly on WeGame	Keys purchased on e-store websites then redeemed on global version of Steam
Games Played On	WeGame / Zhengqi Pingtai	Global version of Steam
VPN or Speed Booster Required	No	Yes
ISBN / Government approval Required	Yes	No
Time to Market	Extended	Rapid
Local payment options supported	Yes	Yes

When thinking about the distribution of Western PC games in China, what is your primary assumption about how players access them?

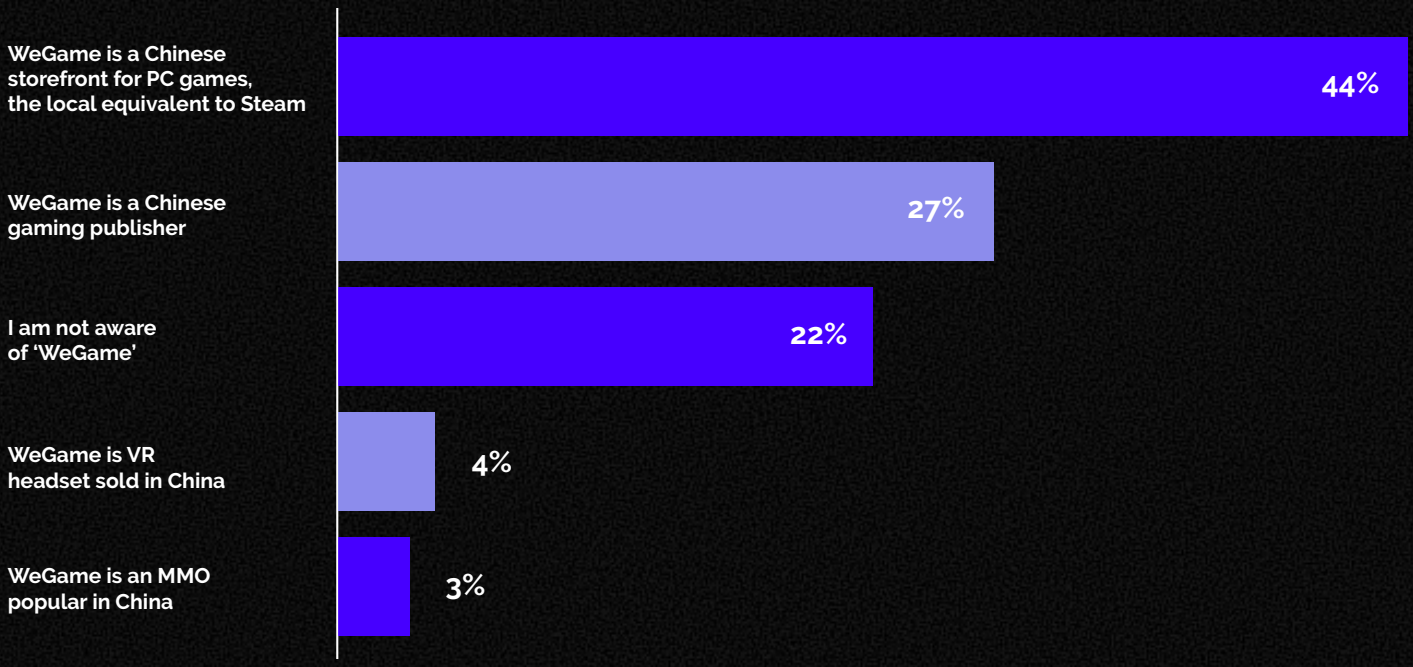


When asked where players primarily purchase their games, nearly a third **(31%)** of developers believe the market is led by players using VPNs to purchase from the international version of Steam. While many believe VPNs are used to access global titles, the local reality is more nuanced. Players favor 'game boosters', services which reroute network traffic in China to game servers overseas. Compared to VPNs, this approach provides a more reliable networking speed for competitive play, as it doesn't require encryption, while still making global titles available for local players.

Concurrently, **59%** of developers operate under the assumption that Chinese users mainly access titles by buying them through official, regulated platforms in China like WeGame.



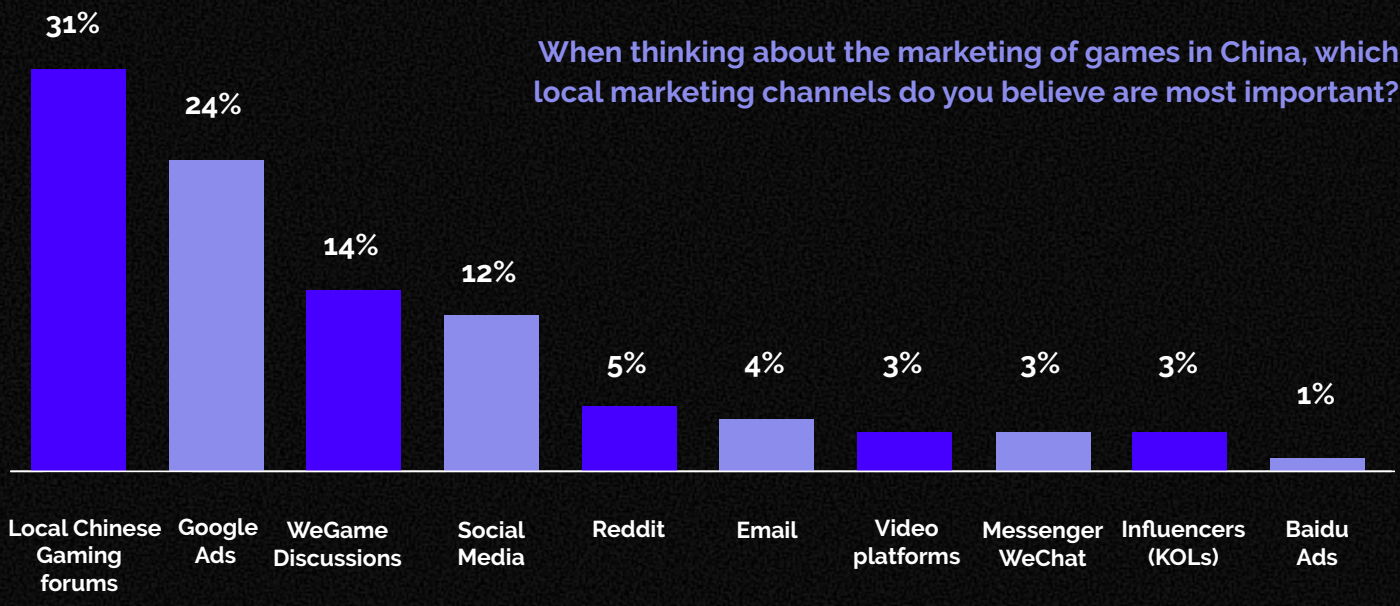
Select the true statement about 'WeGame'



Successfully defining WeGame is a challenge for developers. Fewer than half **(44%)** of respondents accurately identify Tencent's platform as a Chinese storefront for PC games. **27%** mistakenly classify the platform solely as a game publisher, and **22%** were unaware of the platform. When developers struggle to name the primary PC games platform in the country, it becomes clear that knowledge gaps may prevent them from executing the best distribution strategy.

Whether players purchase on WeGame or through e-stores, targeted marketing to local players remains vital, although there's a tendency for developers to favor Western marketing channels, many of which are unavailable in China.





As illustrated in the chart above, when asked to rank their #1 marketing channels for China, nearly a quarter favor Google Ads: a platform entirely blocked in China.

Conversely, developers vastly undervalue the essential social and video networks that primarily drive engagement in China. A mere **12%** of respondents ranked local social media giants like Weibo, Xiaohongshu, or Douyin as their primary marketing channel. Crucial engagement avenues such as Bilibili, Youku, WeChat, and local influencers each received a marginal **3%** of top-rank priority. Local Chinese gaming forums did secure the number one spot for **31%** of respondents, showing some awareness of grassroots community building, but many of these global-minded tactics remain misaligned with local reality.

Lessons From Distributing A Beloved RPG In China

As our data has shown, a bespoke distribution strategy is required to reach players in China. One that recognizes the preferred marketing channels for players in the region.

At Rokky, we've gained an expert understanding of this market by working with global studios to distribute their titles in China. This year, we were proud to bring a beloved tactical RPG to an all-new audience as we managed game distribution and marketing for the game's regional launch.

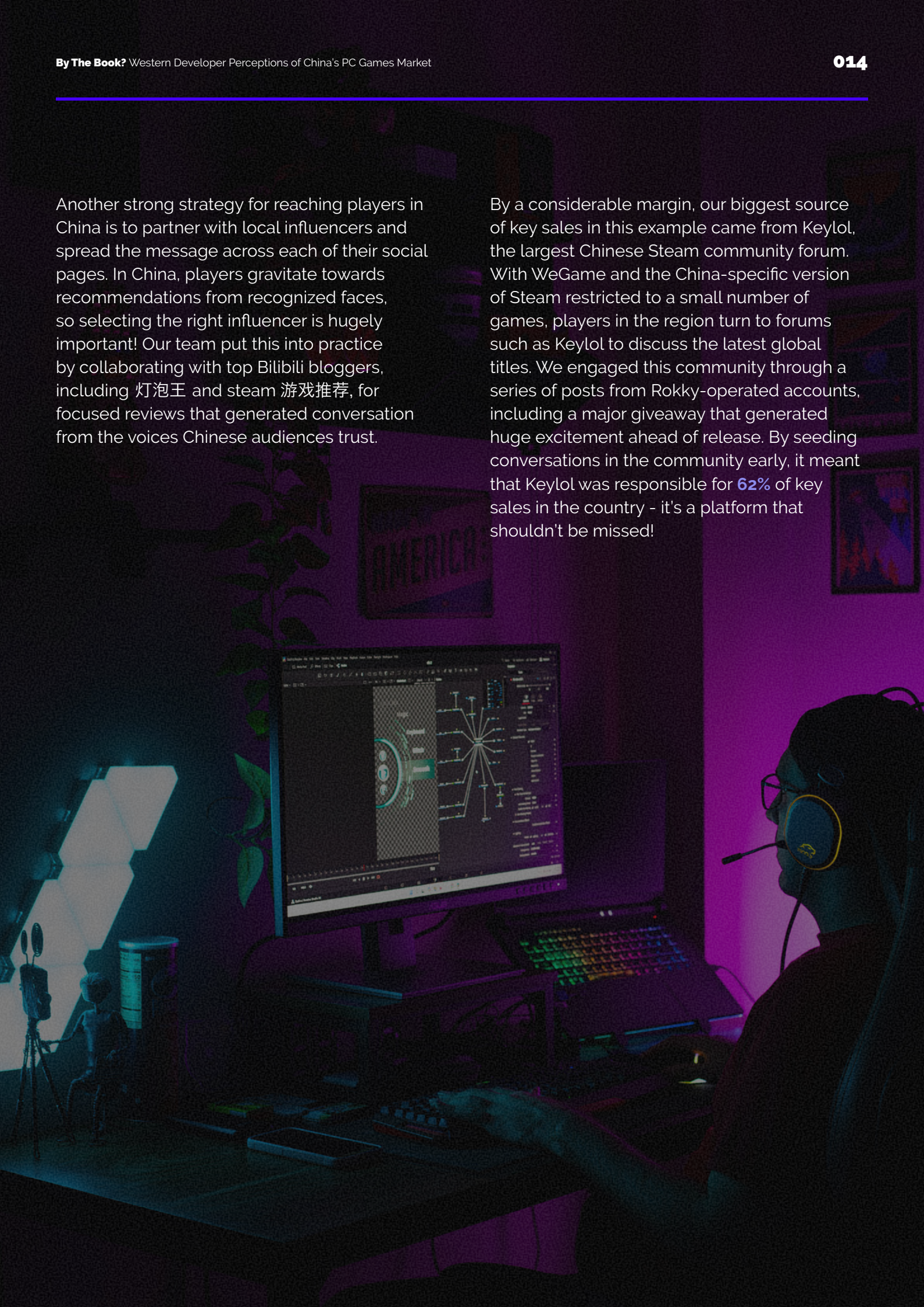
The first step to success involves mastering regional timing. When bringing a game to a new market, it's important to understand the local holidays and seasonal events in each country. In fact, we've **written an entire blog on this very topic**. In China, 五 (May Day), a five-day holiday that sees a rise in consumer spending, is an ideal example. Timing your launches to Chinese e-commerce windows like May Day, 618 in June, October's National Day, or Double 11 in November provides a great opportunity for newly released games to receive a massive boost in visibility and sales.

In China, a pay-to-play marketing approach is commonly required to capture player attention. It pays to focus your marketing efforts across the platforms where Chinese gamers spend their time. For the launch of this tactical RPG, we utilized important regional video and social platforms, promoting the game across Rokky-operated accounts on Bilibili, Weibo, WeChat, Douyin, Kuaishou, and RedNote (Xiaohongshu).



Another strong strategy for reaching players in China is to partner with local influencers and spread the message across each of their social pages. In China, players gravitate towards recommendations from recognized faces, so selecting the right influencer is hugely important! Our team put this into practice by collaborating with top Bilibili bloggers, including 灯泡王 and steam 游戏推荐, for focused reviews that generated conversation from the voices Chinese audiences trust.

By a considerable margin, our biggest source of key sales in this example came from Keylol, the largest Chinese Steam community forum. With WeGame and the China-specific version of Steam restricted to a small number of games, players in the region turn to forums such as Keylol to discuss the latest global titles. We engaged this community through a series of posts from Rokky-operated accounts, including a major giveaway that generated huge excitement ahead of release. By seeding conversations in the community early, it meant that Keylol was responsible for **62%** of key sales in the country - it's a platform that shouldn't be missed!



Today's report has shown the importance of e-stores in reaching Chinese players, and that's true in the case of our support for this title. At Rokky, we operate ChinaPlay, an e-store that sees one million gamers in China visit every year. To reach the ideal audience, we ran an email campaign to reach players directly, using the e-store as both a targeted marketing channel and a shopping destination in one!

The result? During the game's launch month, we sold more than 1,000 keys, providing additional revenue to the publisher, unlocked by a new market. Check out the breakdown to understand which marketing channels provided the most impact.

Sales Attribution

Channel	Share
Keylol	62.3%
Weibo (seeded + paid promotion)	15.4%
Email newsletters (owned base)	13.4%
Bilibili paid blogger integrations (3)	3.6%
Tieba (Baidu forums, 5 sub-forums)	1.9%
Bilibili (owned channel + WeChat cross)	1.6%
General campaign code	0.9%
Organic (no code)	0.5%
V2EX	0.4%
Other	0.1%
Total	**100%**

Reading Between the Lines

Our data shows that Western developers clearly see the appeal of Eastward expansion. Driven by the prospect of immense unit sales and an audience perceived as highly tolerant of in-game spending, studios are eager to tap into this potential.

However, key knowledge gaps around distribution and marketing platforms show that studios may underestimate the bespoke work required to enter the market. Copying and pasting Western distribution and marketing strategies will do little to appeal to China's specialized gaming market.

Regulatory requirements, ISBN intricacies, bespoke storefronts, VPNs & Speed Boosters, and tailored marketing requirements all suggest a more nuanced approach is required to effectively bring titles to China's player base. This complex reality is why many studios look to local partners to help read between the lines and enter the world's largest gaming market, one that's only set to grow...

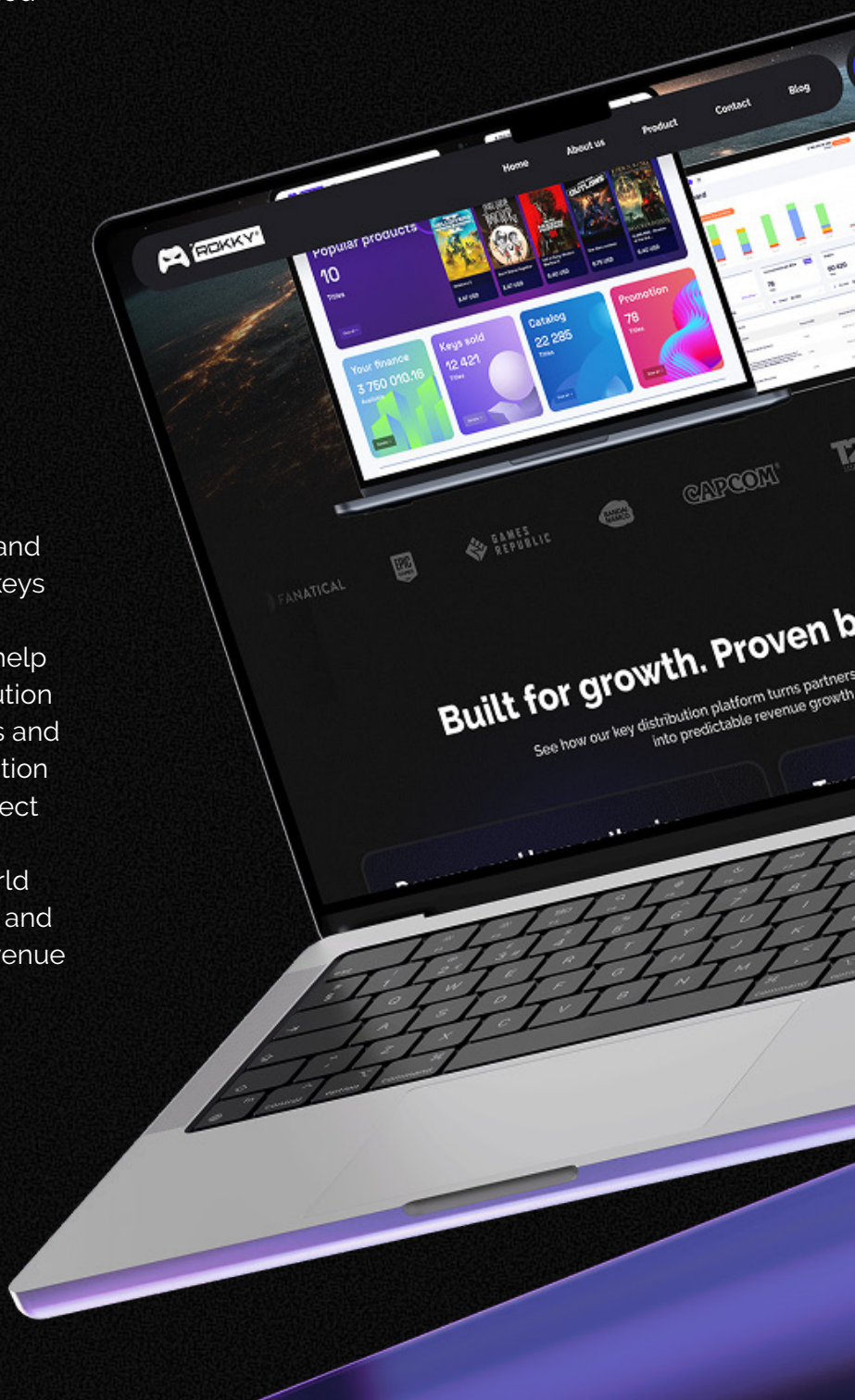
Methodology

An online survey was conducted by Atomik Research among 300 PC and console game developers from across the UK and USA, at manager level and above. The research fieldwork took place between 19 - 27 May 2026. Atomik Research is an independent creative market research agency that employs MRS-certified researchers and abides by the MRS code.

About Rokky

Rokky is a PC game distribution platform and publisher delivering publisher-approved keys to global markets. The company partners with over 200 stores around the world to help publishers take full control of their distribution beyond Steam. Rokky enables developers and publishers to enter the alternative distribution space safely, expand their reach, and protect their games from unauthorized resellers. Publishers like Nacon, Team17, and Offworld choose Rokky for streamlined distribution and data-backed growth, tapping into new revenue streams and reducing reliance on large platform monopolies.

To learn more, visit https://rokky.com.





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