



BloggerInsight.com

**FREE PREVIEW**

China's

# Top 10 Social Games



and the Top SNS Platforms



December 2009

# FULL REPORT

Price: USD 790

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## Full Report Includes:

- **Detailed profiles of Top 10 Social Games:**
  - Game description and overview, analysis from expert bloggers and industry insiders, and screen shots
- **Background & analysis of Top Social Networks:** Qzone, Kaixin001, Renren, 51.com
  - Market positioning, user data estimates and game developer relationships
- **BONUS:** 1 Free hour of private consulting with a BloggerInsight Social Games Analyst
- **BONUS:** 1 Free ImmersionCast Video
  - Experience a top 10 game first hand without the language barrier



BloggerInsight conducts online focus groups with expert Chinese bloggers to give clients the necessary information to make smart decisions. Our network of bloggers spans a variety of industries and has been hand-picked to represent some of the top independent thinkers in their respective fields. BloggerInsight gives bloggers a new method for monetizing their knowledge while providing clients a cost-effective way to receive tailored, independent advice.

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# Executive Summary

BloggerInsight analyzed SNS platforms and the top 10 social games in China, sourcing much of the intelligence directly from expert bloggers.

## 1.0 Top SNS Platforms

There is no single dominant network, no Facebook for all of China. Instead, there is fierce competition between 4 big players and other SNS. Most Chinese are members of multiple SNS, on average 2.78.

### **Qzone**

Qzone draws traffic from QQ Messenger, which boasts 484 MAU and is also owned by Tencent. Qzone claims 305m MAU and targets teens, rural, and casual users. Qzone develops in-house copies of popular games, though it is experimenting with licensing.

### **Kaixin001**

*Kaixin001* is the hottest SNS in China with 50m+ MAU, including many white-collars who are addicted to its sticky social games. Kaixin001 develops in-house copies of popular games, and is a leader in product placement.

### **Renren** (formerly Xiaonei)

Renren copied the Facebook model: it started with students and has since opened to all. It has a self-reported 100m MAU. Renren has a semi-open API for 3<sup>rd</sup> parties (up to 56% revenue share).

### **51.com**

51.com has 39 MAU, mainly rural users. It appears to be in decline relative to other SNS. 51.com also has a semi-open API for 3<sup>rd</sup> parties.

### **Other Players**

Related to the “multiple memberships” is the long tail of SNS in China. In addition to the “big four”, there are also numerous smaller SNS platforms that are growing or have discovered a sustainable niche (and include games). Some brands also create their own vertical SNS platforms.

## 2.0 Top 10 Social Games

Identifying the top 10 social games in China is fraught with methodological challenges: competing platforms, incomplete data, copycat and variant games, and rapid change. The profiles therefore provide an overall picture rather than a definitive ranking by user count:

### **#1 Happy Farm**

*Happy Farm* has 27m DAU in China and *FarmVille* boasts 28m DAU on Facebook. In addition, there are countless copycats and variants. Chinese versions are more competitive: they allow users to steal and add worms and weeds to friends' farms.

### **#2 House Buying**

Kaixin001's *House Buying* innovatively combines a real estate section, #1 *Happy Farm*, and #4 *Parking Wars* into a single game with a common currency. It is by far the most popular game on Kaixin001.

### **#3 Happy Aquarium**

*Happy Aquarium* is a combination of *Happy Farm* underwater and a pet game. Fish games are rapidly growing both in China and on Facebook.

### **#4 Parking Wars**

*Parking Wars* is copied directly from the Facebook title of the same name. It sparked the social game craze in China and remains popular to this day.

### **#5 Renren Restaurant**

*Renren Restaurant* is similar to *Café World* on Facebook. Its relative sophistication indicates the future of China social games.

### **#6 Slave Manor**

*Slave Manor* is a copy of the original Facebook game *Friends for Sale!* While in decline, this highly socially interactive game remains fairly popular on Qzone.

### **#7 Building One**

In *Building One* users virtually live, work (e.g., by opening a hairdresser or spa), and socialize together in a single tall tower.

### **#8 Wonder Hospital**

In *Wonder Hospital*, users heal patients to acquire money and fame. The game includes innovative and controversial ads.

### **#9 Animal Paradise**

In *Animal Paradise*, users raise and collect products from animals, a combination of the popular farm and pet game formulas.

### **#10 Small Games**

*Small Games* is a collection of classic games ranging from *Tetris* to *Air Hockey*. The games are quick, simple, and mildly socially interactive.

### 3.0 Analysis and Statistics

Five key patterns are evident in China's social games market, based on the Top 10 Social Games and statistics for Renren, 51.com, and Facebook:

1. The Chinese game development industry is fragmented, though it is undergoing consolidation and may see major Western developers enter soon.
2. Game themes and mechanics translate across China and Facebook.
3. Chinese games are more competitive than their Facebook counterparts: status and stealing play a large role.
4. Farm games are far and away the most popular titles in China and worldwide.
5. Chinese social games tend to lag behind Facebook. Generally, popular games on Facebook are copied and become popular in China.

### 4.0 Further Resources

BloggerInsight sources intelligence from expert Chinese bloggers, including industry experts and addicted social gamers. BloggerInsight works with clients to customize reports, but can cover:

1. Hot trends in China social games
2. The relationship between game developers and SNS platforms
3. The relationship between brands and SNS platforms
4. Focus groups, available to review specific social games
5. Additional custom topics, contact us for details

A number of other web resources cover the growing social games market in China.

## Glossary

\* = BloggerInsight Estimate

*When accurate data is unavailable BloggerInsight offers rough estimates of users for some games based on the number of users on the network, discussions with game developers, and anecdotal information.*

**DAU** = daily active users

**MAU** = monthly active users

**Stickiness** = percentage of installations that stick as DAU. The more frequently users log in, the “stickier” a game is.

## Methodology

BloggerInsight analyzed SNS platforms and the top 10 social games in China, sourcing much of the intelligence directly from expert bloggers. The report aims to cover the most popular applications, but should not be construed as a definitive ranking of the 10 most popular games in China by user count. There are a number of challenges inherent in compiling such a list:

**1) Competing Platforms:** There is no single dominant network, no Facebook for all of China. QQ targets teens, Kaixin001 draws white collars, Renren started with students, and 51.com attracts users from less developed areas. Compiling statistics across platforms is a challenge.

**2) Incomplete Data:** DAU statistics for specific games are available for only Renren and 51.com, which are far smaller than Qzone and Kaixin001 (which have strict no comment policies). Because such data is unavailable, BloggerInsight offers rough estimates of users for some games based on the site's user count, discussions with game developers, and small surveys. Additionally, data on user counts are self-reported, so they could be manipulated to suit the site's interests.





**3) Copycats:** In China, success breeds copycats. In fact, entire platforms like Kaixin001 are built on copycats. For a top 10 list, this raises an issue of classification: Should the original *Happy Farm* game (on Qzone, Renren, and 51.com) be grouped together with that on Kaixin001, which includes a near-identical farming game as a section of its sprawling *House Buying* game? In this case, BloggerInsight noted Kaixin's entry under *#1 Happy Farm* and also included the larger *#2 House Buying* as a separate game.

**4) Variants:** In addition to copycats, each success inspires innumerable variants (as also happens on Facebook). Games set to a different theme, but with identical game mechanics are not listed twice. For example, *#1 Happy Farm* is reviewed, but *Happy Fishpond*, a game where one farms fish instead of crops, is not. In this case, the *#1 Happy Farm* profile lists *Happy Fishpond* under "Similar Chinese Games."

**5) Rapid Change:** The social games market is evolving at a breakneck pace. The general pattern is that a game becomes popular on Facebook, copies follow in China, and then the game is slowly replaced by new titles. For example, *#4 Parking Wars*, *#6 Slave Manor*, and *#10 Small Games* are still popular in China, but now on the decline relative to newer games like *#3 Happy Aquarium* and *#5 Renren Restaurant*. However, there are a few games that defy this pattern: *#1 Happy Farm* first spread in China and seems to enjoy enduring popularity.

# 1.0 Top SNS Platforms

## 1.1 Overview

	Qzone	Kaixin001	Renren	51.com
				
URL	<a href="http://qzone.qq.com">http://qzone.qq.com</a>	<a href="http://www.kaixin001.com">www.kaixin001.com</a>	<a href="http://www.renren.com">www.renren.com</a>	<a href="http://www.51.com">www.51.com</a>
MAU (self-reported)	305m	50m+	100m	39m
Audience	Teens Rural users	White-collars	Students White-collars	Rural users
Alexa Rank (for China)	#2 (for all QQ.com sites)	#9	#15	#51
Pageviews/User	10	32	14	4
Avg. Time on Site	15 min	30 min	20 min	5 min
Primary Attraction(s)	Chat Games	Games	Friend Network	Friend Network Games

### A Crowded, Competitive Market

There is no single dominant network, no Facebook for all of China. The actual Facebook.com is blocked for an indefinite time period in China, due to government concerns over the spread of uncensored information (Chinese SNS platforms all quickly remove “objectionable” content). Before the block in July 2009, Facebook gathered 1.5m registered accounts and showed rapid growth, but it has since fallen off to only 50,000 MAU because proxy or VPN technology are now required for access. It is unlikely that a foreign SNS platform will conquer the China market anytime soon.

The stakes are high and competition is fierce in China’s SNS market. The Asian virtual goods market, of which SNS platforms are increasing the gatekeepers and beneficiaries, is worth over 7bn USD annually (the US, by comparison is worth an estimated 1bn), according to the research agency Plus 8\*. There are 9 online gaming companies listed on the Nasdaq and HKSE with a total market value of 52bn USD, twice as much as the US’s Blizzard, EA, Ubisoft, and Take Two combined. Although many smaller and

niche networks are also after a piece of China's 4bn USD online gaming market, the biggest players are Qzone, Kaixin001, Renren, and 51.com.

## Fierce Competition in China's SNS Market

As of April 2009, so registration figures are already dated. The market has since consolidated around Qzone, Kaixin001, Renren, and 51.com

Blue highlight = foreign SNS

Name	Webpage		Registered Accounts	Global Alexa ranking
1 QQ	Qzone.qq.com		376,000,000	17
2 51	www.51.com		130,000,000	359
3 Baidu	tieba.baidu.com		110,000,000	11
4 Xiaonei	www.xiaonei.com		40,000,000	168
5 Kaixin	www.kaixin001.com		30,000,000	135
6 Baidu Kongjian	hi.baidu.com		27,500,000	11
7 Ipartment	www.ipart.cn		22,000,000	4,489
8 360quan	www.360quan.com		11,000,000	2,932
9 Wangyou	www.wangyou.com		10,000,000	412
10 Tongxue	www.tongxue.com		10,000,000	3,493
11 Baihe	www.baihe.com		9,000,000	10,763
12 Zhanzuo	www.zhanzuo.com		7,000,000	12,872
13 Myspace	www.myspace.com		6,000,000	9
14 Douban	www.douban.com		2,000,000	372
15 Tianji	www.tianji.com		1,500,000	10,695
16 Wealink	www.wealink.com		1,500,000	15,285
17 Facebook	www.facebook.com		1,452,000	5
18 Friendster	www.friendster.com		1,100,000	47
19 LinkedIn	www.linkedin.com		1,026,000	110
20 Hainei	www.hainei.com		1,000,000	16,363

Notes: QQ figures are for QQ Messenger, not Qzone. Xiaonei was renamed Renren.

Source: Web2Asia

## QQ and Qzone: Introducing the Chinese Internet

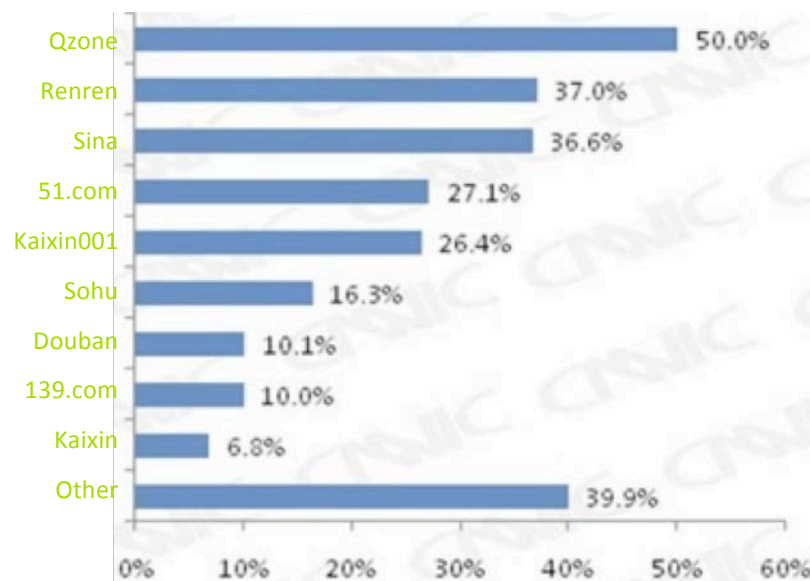
For many Chinese, the first introduction to the internet comes via Tencent's popular QQ Messenger, which boasts 484 MAU. That chat service then directs users to Qzone, which is China's largest SNS with a self-reported 305 MAU, although most users use nicknames and visit only occasionally. Tencent is trying to parlay its dominance of the teen scene into a successful network for more mature users, but has had only limited success so far.

## Renren and Kaixin001: For Students and White-Collars

Renren (formerly Xiaonei) copied the Facebook model and began by adding elite university students, then all students, and lastly opened to all (now 100m MAU). Along the way however, they were blindsided by upstart Kaixin001, which exploded in popularity (50m+ MAU) among white-collar office workers by focusing on fun, addictive social games. 51.com enjoyed early success by targeting users in rural areas (39m MAU), but now appears to be losing out against Kaixin001 and Renren.

## The Multiple Memberships of Chinese Users

Most Chinese are members of multiple SNS, on average 2.78.



Notes: Survey conducted in July 2009 via 3007 telephone interviews, across a range of 1, 2, and 3 cities.

Source: Chinese Internet Network Information Center (CNNIC)

For instance, a common pattern in BloggerInsight surveys was that young professionals had used QQ/Qzone in the past, still maintain a friendship network via Renren, but now use Kaixin001 at work, primarily for gaming and light social interaction.

## The Long Tail of SNS in China

Related to the “multiple memberships” is the long tail of SNS in China. In addition to the “big four”, there are also numerous smaller SNS platforms that are growing or have discovered a sustainable niche (and include games). Such SNS platforms include: iPartment, Mop hi, 360Quan, Meet8.com, Zhanzuo.com, Hainei.com, Wealink.com, and TX.com.cn. Finally, a popular approach for brands in China is to create a special network to market their product. Examples of brands that have created SNS platforms include: Phillips, New Balance, HP, and Mango.

## Demographics of Chinese SNS Users: Young and Educated

### Age

- Of Chinese SNS users, 53% are 20-29
- Of Chinese Internet users, only 23% are 20-29

### Education

- Of Chinese SNS users, 59% are college educated
- Of Chinese Internet users, only 34% are college educated

### Income

- Of Chinese SNS users, 18% have a monthly income >3000 RMB
- Of Chinese Internet users, only 13% have monthly income >3000 RMB

*Source: Chinese Internet Network Information Center (CNNIC)*

## User Behavior: Real Friends and Entertainment

### Offline Relationships Go Online

SNS still spread through offline relationships:

- 80% of users were invited to join a SNS by friends, classmates, or colleagues
- 76% of users said that their online SNS friends are also their offline contacts

### **Activities Online**

Of Chinese SNS users:

- 51% comment on friends' activities
- 49% use photo album centric applications
- 42% promote their personal websites or blogs

### **Entertainment is King**

The main attractions for Chinese SNS users:


- 42% "killing time"
- 27% "playing games"

*Source: Chinese Internet Network Information Center (CNNIC)*

### **Games Dominate The Top Apps**

Entertainment is king on the Chinese internet, so it follows that games dominate the top apps on Chinese SNS platforms. On Renren, the top 15 apps are all games. On 51.com, 14 of 15 are. On Facebook, only 10 of 15 are—others include *Causes*, *We're Related*, *Birthday Cards*, and *Movie Reviews*. Renren, in fact, isn't even focused on gaming (relative to Kaixin001, for example), but social games still dominate its apps section.

## 1.2 Qzone

 QQ空间 QZONE.QQ.COM	
URL	<a href="http://qzone.qq.com">http://qzone.qq.com</a>
MAU	305m
Audience	Teens Rural users
Alexa Rank (for China)	#2 (for all QQ.com sites)
Pageviews/User	10
Avg. Time on Site	15 min
Primary Attraction(s)	Chat Games

### Users

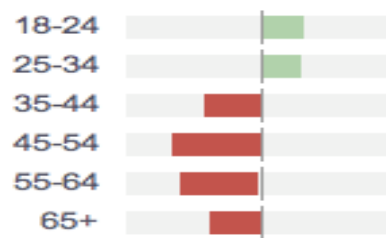
Tencent's Qzone is the largest of China's SNS platforms with a self-reported 305m MAU, although most are young, occasional users. The primary recruitment tool is the popular QQ Messenger; in its 2009 Q3 earnings announcement Tencent announced that the chat service had reached 484m MAU. QQ Messenger is used to direct users to Qzone, QQ Show, QQ Games, and countless other Tencent sites. Because the same QQ ID can be used across all these services and setting up a Qzone page requires only nickname, site name, city, gender, and birthdate, the true devotion of these 305m MAU Qzone users is questionable—it's likely that a large percentage simply stop by occasionally or play a quick game.

Qzone's users are mostly teenagers or rural users, those from Tier 2 or 3 cities. They tend to use nicknames rather than real-name identities and will add and accept strangers as friends. Because Qzone isn't based on real-name networking, some analysts don't even consider it to be a SNS. The overall style of QQ sites is somewhat similar to MySpace—personalized, cluttered, and cute, as embodied by QQ's endearing penguin icon. For the same reasons, QQ and Qzone have difficulty retaining more mature, urban users.

## Qzone Demographics

The **green bar** indicates that the demographic is overrepresented *relative to the general internet population*. The **red bar** indicates that the demographic is underrepresented.

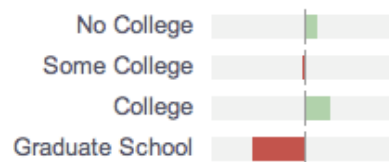
### Age



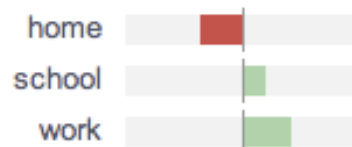
### Gender



### Education



### Browsing Location



Date: Nov. 13, 2009  
Source: Alexa Rankings

## Features

Tencent, parent company of QQ franchise, is *the* world leader when it comes to micropayments—2009 Q3 profits rose to 209m USD on the strength of online games. A considerable number of users subscribe to the “diamond” level membership, which grants users a number of Q Coins to purchase virtual items (for a particular QQ service) in exchange for a small monthly fee.

Qzone also relies upon the micropayment model: many of the popular games limit the number of free installations per day (e.g., #1 *Happy Farm*, #4 *Parking Wars*, and #6 *Slave Manor*). To install the application for the first time, a user must either wake up early or pay for one of Qzone’s monthly subscription plans. BloggerInsight is unsure why Qzone has chosen this “upfront subscription” over a freemium model, finding it difficult to judge the true popularity and profitability of the Qzone games.

As an aside, Tencent’s *QQ Show* is an extremely popular game, though it is not reviewed in full in this report because it is not hosted on a true SNS platform. *QQ Show* allows users of QQ Messenger to dress their QQ avatars and enter them into competitions where users vote to select the most fashionable. It is one of the services that attracts many monthly subscribers.

Qzone has an in-house team of developers that copy popular games, though they are experimenting with licensing to select game developers. For example, Five Minutes, the developer of the original #1 *Happy Farm* has such a licensing agreement, though the terms are not public.

## User Interface

The screenshot shows a QQ Zone user interface for a user named 卢凯. The interface is divided into several sections:

- Header:** Contains the user's name, profile picture, and navigation links like "Home page: Diary, Music box, Message Board, Photo Album, Status, Personal Profile, Friends".
- Left Sidebar:** Lists various applications such as "心情" (Mood), "好友日志" (Friend's diary), "投票" (Voting), "分享" (Sharing), "听音乐" (Listen to music), "秀世界" (Show world), "礼物" (Gifts), "好友问答" (Friend's Q&A), "好友买卖" (Friend's buy/sell), "抢车位" (Car parking), "QQ农场" (QQ Farm), "丝路英雄" (Silk Road Hero), "欢乐斗地主" (Happy Dou地主), and "豆瓣读书" (Douban Reading).
- Center:** Features a "Status updating place" with a text input field and a "发表" (Post) button. Below it is the "我的空间动态" (My space dynamic) section, which includes "好友动态" (Friend's dynamic) and "Friends' feeds".
- Right Sidebar:** Includes "好友搜索" (Friend search), "好友管理" (Friend management), "娱乐应用消息" (Entertainment application messages), "2个小纸条" (2 small notes), "好友请求" (Friend requests), "最近访客" (Recent visitors), and "邀请好友开通空间" (Invite friends to open space).
- Bottom:** Contains an advertisement for "正品玫瑰凯" (Authentic Rose Kai).

Annotations and arrows point to specific features:

- A box on the left lists: "Setting: Status, Diary, Voting, Sharing, Music, Show space, Gifts, Q&A, and other applications". An arrow points to the left sidebar.
- A box labeled "Ads" points to the advertisement at the bottom.
- A box labeled "Friends search" points to the search bar in the right sidebar.
- A box labeled "News" points to the "娱乐应用消息" section in the right sidebar.
- A box labeled "Recently Visited" points to the "最近访客" section in the right sidebar.

The screenshot shows the QQ 2008 interface. At the top, it displays the user's name "Gay Locke" and a search bar "搜索我的好友...". Below the search bar, there are several categories of friends: "QQ好友", "我的好友 (13/217)", "我们在一起 (16/191)", "陌生人 (0/4)", and "黑名单".

A red box highlights a button with a circular icon containing a person and a plus sign. An arrow points from this button to a text box that says: "Click, and you can transfer from IM to Qzone".

At the bottom of the interface, there are buttons for "通讯录" (Address book), "QQ群" (QQ Group), and "最近联系人" (Recent contacts), along with a "查找" (Search) button.

# The Top 10 Social Games

## #1 Happy Farm



**Type:** Farm Game

**Platforms (version, daily active users, installations):**

- Qzone (licensed, \*15m, 100m)
- Kaixin001 (copycat as a section of #3 House Buying, \*7m, pre-installed)
- Renren (original, 4m, 22m)
- 51.com (original, 1m, 5m)
- Facebook (original, unavailable, 2.5m)
- Facebook (Chinese language developer: 6waves, 3m, unavailable)

**Reviewed Version:** Renren

**Launch Date:** Renren (Nov 2008), 51.com (Feb 2009), Facebook (April 2009)

**Similar Chinese Games:** Sunshine Farm, Happy Farmer, Happy Fishpond (fish farming), and Happy Pig Farmer

**Similar Facebook Games:** FarmVille, FarmTown, Barn Buddy, Country Story, (Lil) Farm Life, Country Life, Sunshine Ranch



**Stickiness:** 15% (Qzone), 16% (Renren), 20% (51.com)

## Overview

Farming games are a huge hit in China and worldwide ([article link](#)). Online agriculture dominates the top 6 game titles on China's Renren and Facebook. Across all platforms in China, BloggerInsight estimates that *Happy Farm* has 27m DAU. Zynga's *FarmVille* on Facebook boasts 28m DAU.

### Farm Games: Rulers of the SNS Landscape

#### Top 5 Games on SNS Platforms

RENREN		FACEBOOK	
 (formerly Xiaonei)			
Name	DAU	Name	DAU
1. Happy Farm	4m	1. FarmVille	28m
2. Sunshine Farm	3m	2. Café World	10m
3. Happy Fishpond (fish farming)	1m	3. Happy Aquarium	8m
4. Happy Farmer	1m	4. Mafia Wars	7m
5. Happy Aquarium	1m	5. FishVille	6m

Source: XNapps (Renren) and AppData (Facebook)

"*Happy Farm* is most definitely the first SNS farming game in the world," Season Xu, co-founder of the developer Five Minutes, told BloggerInsight, "a Japanese farm console game inspired us." It was the first application on Renren and quickly became the most popular game across all of China's major social networking sites (Qzone, Kaixin001, Renren, and 51.com). Litters of copycats and variations have since arisen, including Sunshine Farm, Happy Farmer, and Happy Pig Farm.

In addition, the addictive game mechanics have been copied over and over again, set to different themes. For example, iPartment, an SNS

popular among young Chinese women, offers a variation where users can grow flowers and gift bouquets ([article link](#)). And in the popular game *Happy Fishpond* users farms fish instead of crops, but the game mechanics are nearly identical.

### Game Features

*Happy Farm* provides users with a taste of farming life. The game is similar to many of the farming applications on Facebook: users buy seeds, dig, water, weed, harvest, and sell their crops to earn money. To prevent crops from wilting, attracting pests, or being stolen, users have to log in regularly. Many users will keep the application running in the background, even (or especially) while at the office.

### Social Interaction

Social interaction is an integral part of *Happy Farm*. There are two measures of progress in the game: the experience meter and the popularity (or charm) meter. Friends are ranked according to the level of experience that they have achieved, which fosters competitive spirit. The popularity (or charm) meter is entirely social-based: users gain popularity points when they gift or receive flowers, add friends, or when their crops are tended or stolen. Users often focus on the popularity meter after maxing out their experience level. In addition, virtual carrots are offered to users who invite friends to join.

The Chinese versions of *Happy Farm* are also far more competitive than the Facebook ones. All feature stealing crops from friends (not included on most Facebook farm games) and *QQ Farm* on Qzone even allows users to add worms and weeds to friends' fields.

#### *Blogger Comment:*

"Happy Farm first flourished on Renren (formerly Xiaonei) because of the high interactivity between friends. In the early stage of its promotion, a user was awarded a virtual guard dog for inviting 5 friends to join."

This high level of social interaction encourages the spread of the game.

## Revenue Model

*Happy Farm* has the following revenue streams:

- *Micropayments*
  - Examples: Purchase new seeds, flowers, fertilizer, decorative backgrounds (for rent), and even guard dogs to guard crops against theft.
- *Product placement*
  - Examples: Grow potatoes and produce Lay's potato chips. Use Proctor & Gamble's products to spray and protect your crops. As of Dec. 2009, Lenovo is running a promotion on Kaixin001's *Happy Farm* whereby receiving a Zebra as a gift from a friend enters you into a lucky draw for a computer.
- *Advertisements*
  - In sidebars

## User Comments

"QQ Farm is really amusing. Today I bought the decorative background, house, guard dog, and dog kennel. My level has increased all the way to 22."  
(*QQ Farm* on Qzone)

"I have cultivated all my land now. I will only harvest after my vegetables are all stolen... please come here to visit me to increase my popularity!" (*Happy Farm* on Renren)

"Haha, I've become an amateur thief now!" (*Happy Farm* on Renren)

## Game Developer

The developer of *Happy Farm* is Five Minutes, a social games developer based in Shanghai. The company was originally sponsored by a Shanghai start-up fund for college students and has now grown to a development team of 20+ full time employees. After *Happy Farm's* smashing success in China, Five Minutes launched the game for Facebook in April 2009, where it now has a respectable 2.5m installations. Five Minutes was one of the earliest Chinese game developers to "go West" to

Facebook—many more are now following suit. Even more successful is a Chinese-language copy of the game on Facebook by Hong Kong developer 6waves (3m DAU, #11 game overall).

### User Interface



### 3.3 Facebook Top 15 Apps (for comparison)

green = farming

<i>Rank</i>	<i>Name</i>	<i>MAU</i> <i>(millions)</i>	<i>Type</i>	<i>Developer</i>
1	FarmVille	63	farming	Zynga
2	Causes	35	education	Causes
3	Mafia Wars	26	mafia	Zynga
4	Café World	24	games	Zynga
5	We're Related	21	social networking	FamilyLink
6	Pet Society	21	pets	Playfish
7	YoVille	20	lifestyle, fashion	Zynga
8	Farm Town	18	farming	Slashkey
9	Texas HoldEm Poker	19	poker	Zynga
10	Happy Aquarium	18	fish farming	CrowdStar
11	Birthday Cards	18	custom notes	RockYou!
12	Restaurant City	17	restaurant management	Playfish
13	Facebook for iPhone	16	iPhone app	Facebook
14	MindJolt Games	15	small games	MindJolt
15	Movies	14	movie reviews	Flixster

Source: AppData

# 4.0 Further Resources

## 4.1 BloggerInsight Social Sourced Intelligence

BloggerInsight sources intelligence from expert Chinese bloggers. Our platform has 400+ bloggers, including industry experts and addicted social gamers, who provide source research and analysis. This online network of social game and media experts allows us to move quickly to match the evolving market. BloggerInsight works with clients to customize reports, but can cover:

- 1) Hot trends in China social games  
(including mechanics, user preferences, monetization models)
- 2) The relationship between game developers and SNS platforms  
(including API, revenue share, regulations, newsfeed notifications)
- 3) The relationship between brands and SNS platforms  
(including advertising and mini-site campaigns)
- 4) Focus groups, available to review specific social games
- 5) Additional custom topics, contact us for details

# FULL REPORT

Price: USD 790

## CONTACT:

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Website: [www.bloggerinsight.com](http://www.bloggerinsight.com)

## Full Report Includes:

- **Detailed profiles of Top 10 Social Games:**
  - Game description and overview, analysis from expert bloggers and industry insiders, and screen shots
- **Background & analysis of Top Social Networks:** Qzone, Kaixin001, Renren, 51.com
  - Market positioning, user data estimates and game developer relationships
- **BONUS:** 1 Free hour of private consulting with a BloggerInsight Social Games Analyst
- **BONUS:** 1 Free ImmersionCast Video
  - Experience a top 10 game first hand without the language barrier



BloggerInsight conducts online focus groups with expert Chinese bloggers to give clients the necessary information to make smart decisions. Our network of bloggers spans a variety of industries and has been hand-picked to represent some of the top independent thinkers in their respective fields. BloggerInsight gives bloggers a new method for monetizing their knowledge while providing clients a cost-effective way to receive tailored, independent advice.

How may we help you?

[www.bloggerinsight.com](http://www.bloggerinsight.com)