



BloggerInsight.com

FREE PREVIEW

China's

Top 10 Social Games



and Top Social Networks



July 2010

FULL REPORT (123 pages)

Price: USD 990

Purchase URL: http://www.chinasocialgames.com/?page_id=6

Contact: kai@bloggerinsight.com

Full Report Includes:

1) Profiles of Top 10 Social Games

Overview, monetization strategies, user comments, and screenshots

2) Analysis of Top Social Networks

Renren, Kaixin001, Qzone, 51.com: market position, user demographics, and game developer relationships

3) Advertising on SNS

Analysis and examples of advertising for both games and brands

4) Interviews with Industry Insiders

Four industry insiders, includes both developers and publishers

5) Statistics, Pricing Sheets, and Directories

Includes statistics for the most popular apps on RenRen, Kaixin001, Qzone (qualitative), and 51.com, pricing sheets with advertising list prices on the top 4 networks, and directory of top social game developers and publishers in China.

BONUS: 1 Free hour of private consulting with a BloggerInsight Social Games Analyst



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?

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Attached Documents

- 1) Statistics for Top Games on RenRen, Kaixin001, 51.com, Qzone, and Facebook
- 2) Ad Pricing Sheets for RenRen, Kaixin001, 51.com, and Qzone
- 3) Directory of Social Game Developers
- 4) Directory of Social Game Publishers

Executive Summary

BloggerInsight analyzed the top social networks and social games in China, sourcing intelligence from industry insiders and bloggers.

1.0 Top Social Networks

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.

Renren (formerly Xiaonei)

Renren copied the Facebook model: it started with students and has since opened to all. It has a self-reported 120m MAU. Renren has a semi-open API for 3rd parties (up to 56% revenue share).

Kaixin001

Kaixin001 has a self-reported 80m MAU, including many white-collars who are addicted to its sticky social games. *Kaixin001* is a leader of “brand awareness” advertising campaigns and develops in-house copies of popular games. It started testing an open platform for 3rd party app developers in May 2010.

Qzone

Qzone draws traffic from QQ Messenger, which boasts 522 MAU and is also owned by Tencent. Qzone claims 388m MAU and targets teens, rural, and casual users. Qzone develops in-house copies of popular games, though it is experimenting with licensing apps.

51.com

51.com has a self-reported 160m users, who are primarily from more rural areas. But it appears to be in decline relative to the other networks. 51.com also has an open API for 3rd parties.

Other Players

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 peaked at about 27m DAU in China and *FarmVille* boasts 21m DAU on Facebook. 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 Restaurant Games

The most popular restaurant game, *Renren Restaurant*, copies Playfish's *Restaurant City* on Facebook. It was one of the first social games with 3D graphics in China.

#3 Happy Aquarium

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

#4 Happy Baby

Happy Baby is a copy of Playfish's *Pet Society*. It's cute artistic style appeals to Chinese users.

#5 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.

#6 Promotion

Based on a popular Chinese book and film, this workplace simulator allows Chinese white-collars to virtually become the star employee they always dreamed of.

#7 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.

#8 Wonder Hospital

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

#9 X-World

X-World has the same game mechanics and feel as *Mafia Wars!*, though the theme is less violent as mafia games are banned in China.

#10 361° Basketball

361° Basketball is a team-management game that is fully branded by the Chinese sportswear brand 361°.

3.0 Advertising on SNS in China

Social game developers advertise heavily on Facebook, but that is virtually unheard of on Chinese social networks. Prices are high, targeting is poor, ARPU is comparatively low, and few Chinese social game developers have much capital.

Instead, Chinese social networks focus on high-margin “brand awareness” campaigns for big brands (or agencies), ranging in price from 60,000 RMB (about 9,000 USD) to millions of RMB.

Examples of advertising campaigns (for both social games and brands) and the pricing sheets for China’s top social networks are included in this report.

4.0 Analysis

Six key trends are evident in China’s social games market:

1. The Chinese game development industry is fragmented, though it is undergoing consolidation.
2. The major social game developers (Zynga, Playfish, etc.) have all come to China: not for the domestic market, but because talent is abundant and comparatively cheap.
3. Game themes and mechanics translate across China and Facebook.
4. Chinese games are more competitive than their Facebook counterparts: status and stealing play a large role.
5. Chinese social games tend to lag behind Facebook. Generally, popular games on Facebook are copied and become popular in China.
6. Chinese social game developers aim to publish games to Japan or other markets where ARPU is higher.

5.0 Industry Insiders: Strategies and Trends

- Full-length Interviews:
 - Yan Lee, CEO of Buzzinate
 - Lee Kuo (CEO), Minnie Zhao (COO), and Paddy Markham (Product Manager) of Kudos Media
 - Andy Lee, Asia Managing Director of Watercooler
 - Zili Ren, CEO of AppLeap

6.0 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

Lastly, this section links to number of other web resources that cover the growing social games market in China.

What's New in this Edition of the Report

The new edition of the “China’s Top 10 Social Games and Social Networks” adds a host of new material. Moreover, the material from the previous edition (December 2009) is updated to reflect the latest trends in the industry.

New Material:

- Four new game profiles
 - Four new titles in the July 2010 edition (#4 Happy Baby, #6 Promotion, #9 X-World, and #10 361° Basketball) replace games from the previous edition in December 2009 (Parking Wars, Slave Manor, Animal Paradise, and Small Games).
- Interviews with industry insiders
 - Four full-length interviews with game developers and publishers, both Chinese and international
 - Information on ARPU, network relationships, localization, as well as the Taiwan and Japan markets
 - Insider material throughout the report
- Advertising on SNS
 - A detailed analysis of how social games and brands advertise on Chinese social networks. Includes complete pricing sheets and screenshots for each network.
- Directory of Chinese social game developers and publishers
 - Brief listing with additional information on their games, markets, size, and funding when available
- New statistics on the top social games
 - Quantitative data available on RenRen, Kaixin001, and 51.com
 - Qualitative estimates are included for Qzone
- Charts on SNS user demographics from the latest Chinese-language reports

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 intelligence from industry insiders and 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 (and who 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.

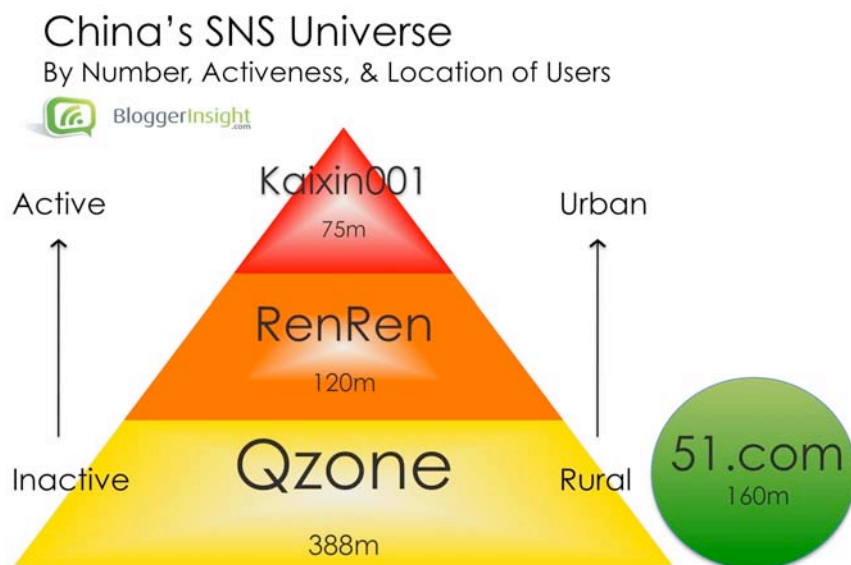
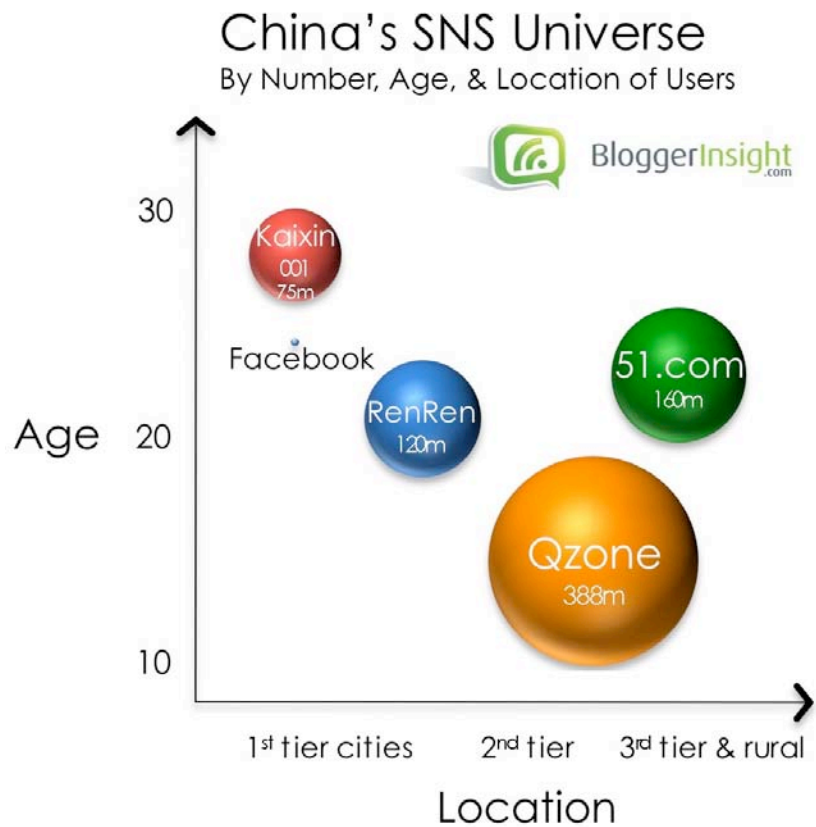
3) Copycats: In China, success breeds copycats. For a top 10 list, this raises an issue of classification: Should the original *Happy Farm* game (on Qzone, Renren, and 51.com) be grouped together with that on Kaixin001, which includes a near-identical farming game as a section of its sprawling *House Buying* game? In this case, BloggerInsight noted Kaixin's entry under *#1 Happy Farm* and also included the larger *#7 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. Four new titles in the July 2010 edition (#4 Happy Baby, #6 Promotion, #9 X-World, and #10 361° Basketball) replace games from the previous edition in December 2009 (Parking Wars, Slave Manor, Animal Paradise, and Small Games).

1.0 Top SNS Platforms

1.1 Overview



China's Top 4 SNS Comparison Table:

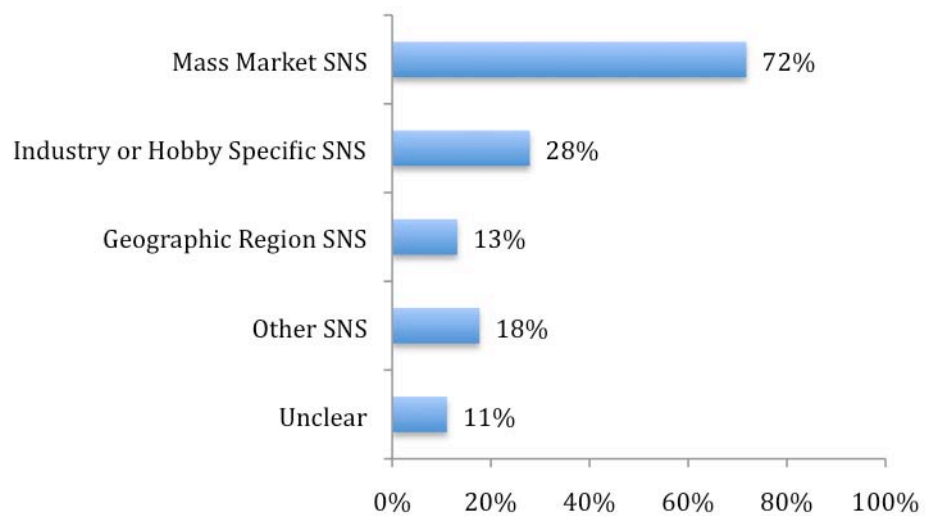
	RenRen 	Kaixin001 	Qzone 	51.com 
URL	www.renren.com	www.kaixin001.com	http://qzone.qq.com	www.51.com
Users (self-reported)	120m	80m+	388m	160m
Alexa Rank (for China)	#19	#17	#2 (all QQ.com sites)	#33
China Rank (traffic)	#20	#18	#2 (all QQ.com sites)	#34
Pageviews/User (Alexa)	15	26	10	10
Market Share CNNIC, February 2010	17%	12%	22%	12%
Users	Students White-collars	White-collars	Teens	Mixed
Location	1 st & 2 nd tier cities	1 st tier cities	2 nd & lower tier cities	Lower tier cities
API	Mostly Open	Closed. Experimenting with open platform.	Closed. Copies apps & games.	Mostly Open
Parent Company	Oak Pacific Interactive	-	Tencent (Chinese Internet giant)	-

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 social networks 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 social network 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 increasingly 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 social gaming market, the biggest players are Qzone, Kaixin001, Renren, and 51.com. In addition to social gaming, Chinese networks are all trying to promote traditional web games as well, which are proven moneymakers in China.

Most Popular Types of SNS



Source: Data Center of the Chinese Internet (DCCI)

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 522 MAU. That chat service then directs users to Qzone, which is China's largest SNS with a self-reported 388 MAU, although most users use nicknames and visit only

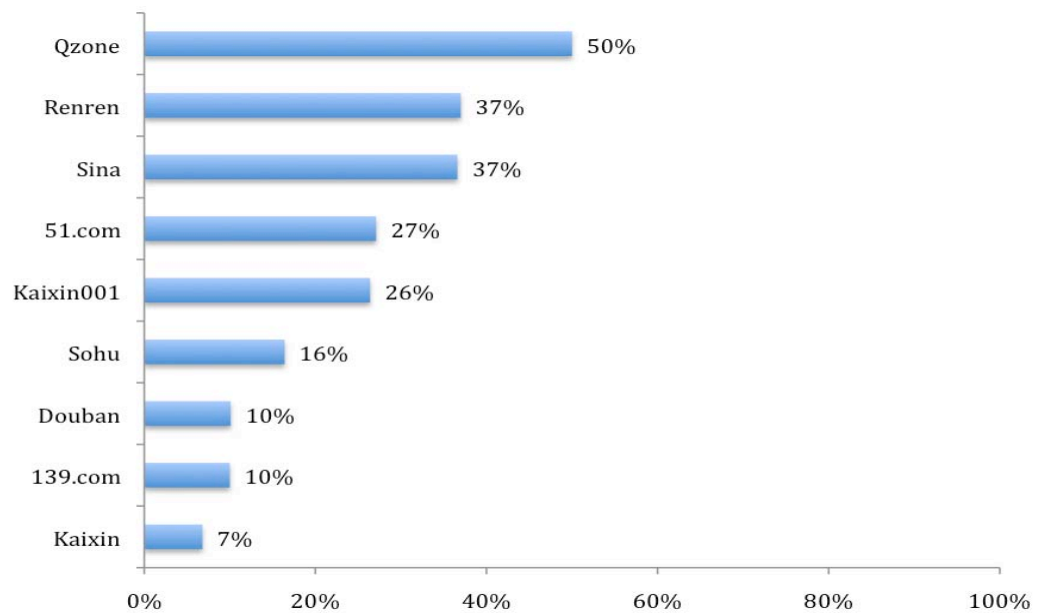
occasionally. Tencent is trying to parlay its dominance of the teen scene into a successful network for more mature users, but has had only limited success so far.

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 120m MAU). Along the way however, they were blindsided by upstart Kaixin001, which exploded in popularity (80m MAU) among white-collar office workers by focusing on fun, addictive social games. RenRen is aggressively competing with Kaixin001 to establish itself as the dominant social network in China. 51.com enjoyed early success by targeting users in rural areas (160m 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 (and still for chatting with old friends), maintain a network of student friends on Renren, but now use Kaixin001 at work, at first for gaming and later more for social purposes.


The Long Tail of SNS in China

Related to these 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, Zhazuo.com, Hainei.com, Wealink.com, and TX.com.cn. BaiLing (white-collar), by the popular portal Sohu, has some popularity,

though it is not as mainstream as the big four. Meanwhile, Shanda, China's publicly-listed gaming giant, recently launched a social network called Tangguo (Candy), that is aimed at gamers (<http://t.sdo.com/>).

Finally, brands in China will also create branded networks to market their products. Examples of brands that have created dedicated social networks include: Phillips, New Balance, HP, and Mango.

1.2 Renren

	
URL	www.renren.com
MAU	120m
Audience	Students White-collars
Alexa Rank (for China)	#19
Pageviews/User	15
Avg. Time on Site	18 min
Primary Attraction(s)	Friend Network

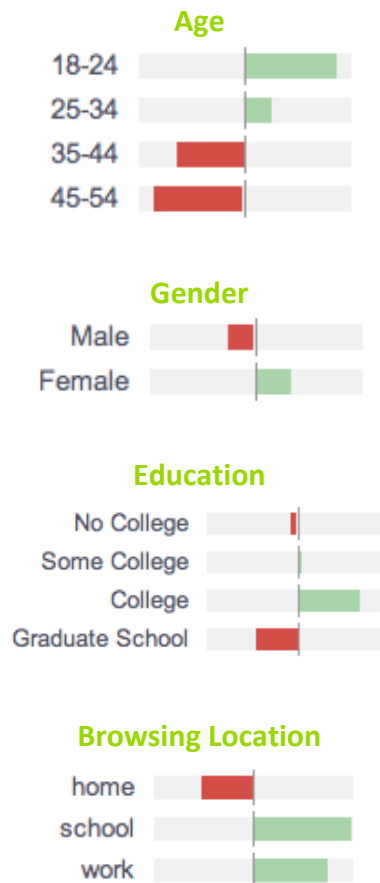
Users

Renren (formerly Xiaonei) is a top SNS site in China, with a self-reported 120m MAU. Following the Facebook model, it began in Dec. 2005 by targeting students on college campuses. Xiaonei (which means “inside campus”) was the first campus-oriented SNS platform in China and it is still dominant among college students. Due to this early success and its high growth potential, Softbank led a consortium of VCs to buy a 35% stake in Renren for 430m USD. The investment sparked controversy, with some Chinese users fearing that personal details might be abused by Softbank, a Japanese firm. It became a hot topic in Chinese BBS (internet forums) and may have helped its competitor Kaixin001 gain traction in the market. In Aug. 2009, it opened its platform to the mass market, renaming itself Renren (“the people’s web”).

In the fall of 2009, Renren launched a massive advertising campaign—via both traditional and digital mediums—urging Chinese to reconnect with old friends and classmates. The network is focused on building real-life friends online, just as on Facebook.

Renren 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.



Date: May. 26, 2010
Source: Alexa Rankings

Features

Renren has a semi-open API for 3rd parties (contracts are handled on a case-by-case basis, with revenue share capped at 56% for content providers). Popular games like #1 *Happy Farm* and #2 *Restaurant Games* offer interactive entertainment between friends, which helps cultivate users' loyalty and increases the stickiness to the website.

A handful of foreign companies participate, but the major Facebook players (Zynga, Playfish, Playdom, etc.) are not present. ARPU and revenue share are both low. Moreover, RenRen produces its own games in-house, which leads to fears that the network will favor its own games over those of third-parties. Still, RenRen remains the most open network in China and the best bet for third party game developers at the moment.

User Interface

The user interface is nearly identical to Facebook (though it has not yet copied Facebook's latest redesign). It has a few unique features, such as a "footprint" of who last visited your page.



Analysis

RenRen is the most popular, most open, and best-financed social network in China. Its management team is also the smartest and fastest-moving. It is actively developing advertising, gaming, and e-commerce revenues. Its user growth is impressive, in large part due to its aggressive marketing campaigns. The August 2009 name switch from Xiaonei (inside-campus) to RenRen (people's web) signaled its ambition to become China's dominant popular SNS. By comparison, China's other social networks are asleep at the wheel.

The Top 10 Social Games

#1 Happy Farm



Type: Farm Game

Platforms (version, daily active users, installations):

- Qzone (licensed, *10m, 100m)
- Kaixin001 (copycat as a section of #3 *House Buying*, *7m, pre-installed)
- Renren (original, 1.6m, 31m)
- 51.com (original, 1m, 20m)
- Facebook (original, unavailable, 2.5m)

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: 10% (Qzone), 5.2% (Renren), 5% (51.com)

Overview

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

See: <http://venturebeat.com/2009/10/29/china-qq-farm-happy-farm-games/>

"*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.

See: http://cnreviews.com/business/research-insights/ipartment-hot-teen-girls_20090921.html

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 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 startup fund for college students and has now grown to a development team of 100+ 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 publisher 6waves.

User Interface



3.2 Renren

RenRen was the first major platform to open to 3rd party game developers and is also most mature as an advertising platform. A flat-rate system applies for the majority of the advertising slots. Rates are listed in the RenRen pricing sheet (accompanies this report), though agencies offer up to 80% off, suggesting that only suckers pay full price.

RenRen also has a marketplace called Bolt (<http://bolt.jebe.renren.com/introduce.htm>) where advertisers can bid for placements, though this applies only to a fraction of the available slots. Advertisers input a daily budget and target audience and bid via cost per click (minimum of 0.5 RMB) for banners on the applications page. Because these ads are frequently displayed next to games, the Bolt marketplace is especially relevant for game developers. If the Bolt marketplace is successful, RenRen may extend it to cover additional advertising slots.



Advertising for MMORPG games on Renren (right-hand side)

6.0 Further Resources

6.1 BloggerInsight Social Sourced Intelligence

BloggerInsight sources intelligence from expert Chinese bloggers. Our platform has 500+ 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

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Price: USD 990

Purchase URL: http://www.chinasocialgames.com/?page_id=6

Contact: kai@bloggerinsight.com

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How may we help you?

www.bloggerinsight.com