

Game Developers Conference®

February 28 - March 4, 2011
Moscone Center, San Francisco

www.GDConf.com



SOCIAL & ONLINE GAMES
SUMMIT

GDC 

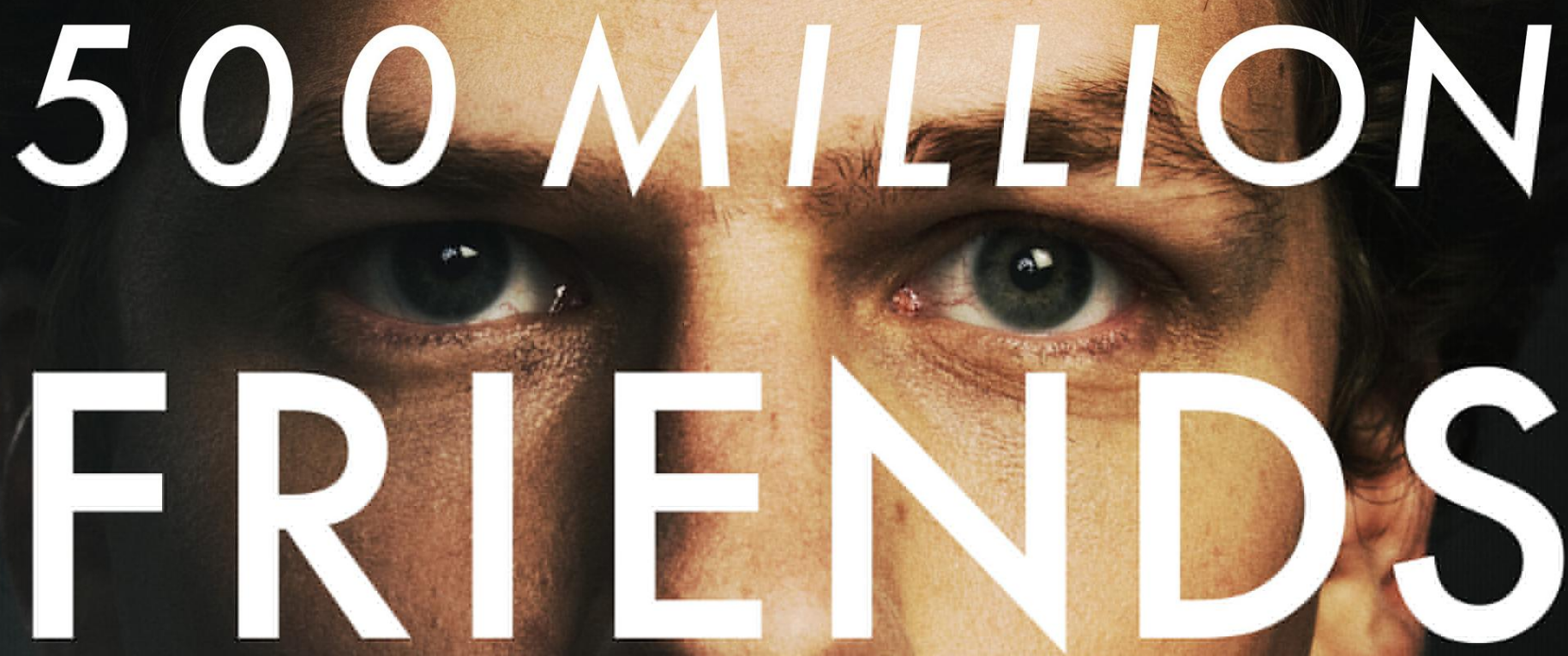
Social Games in Asia

(aka Where Facebook is Not Yet King)

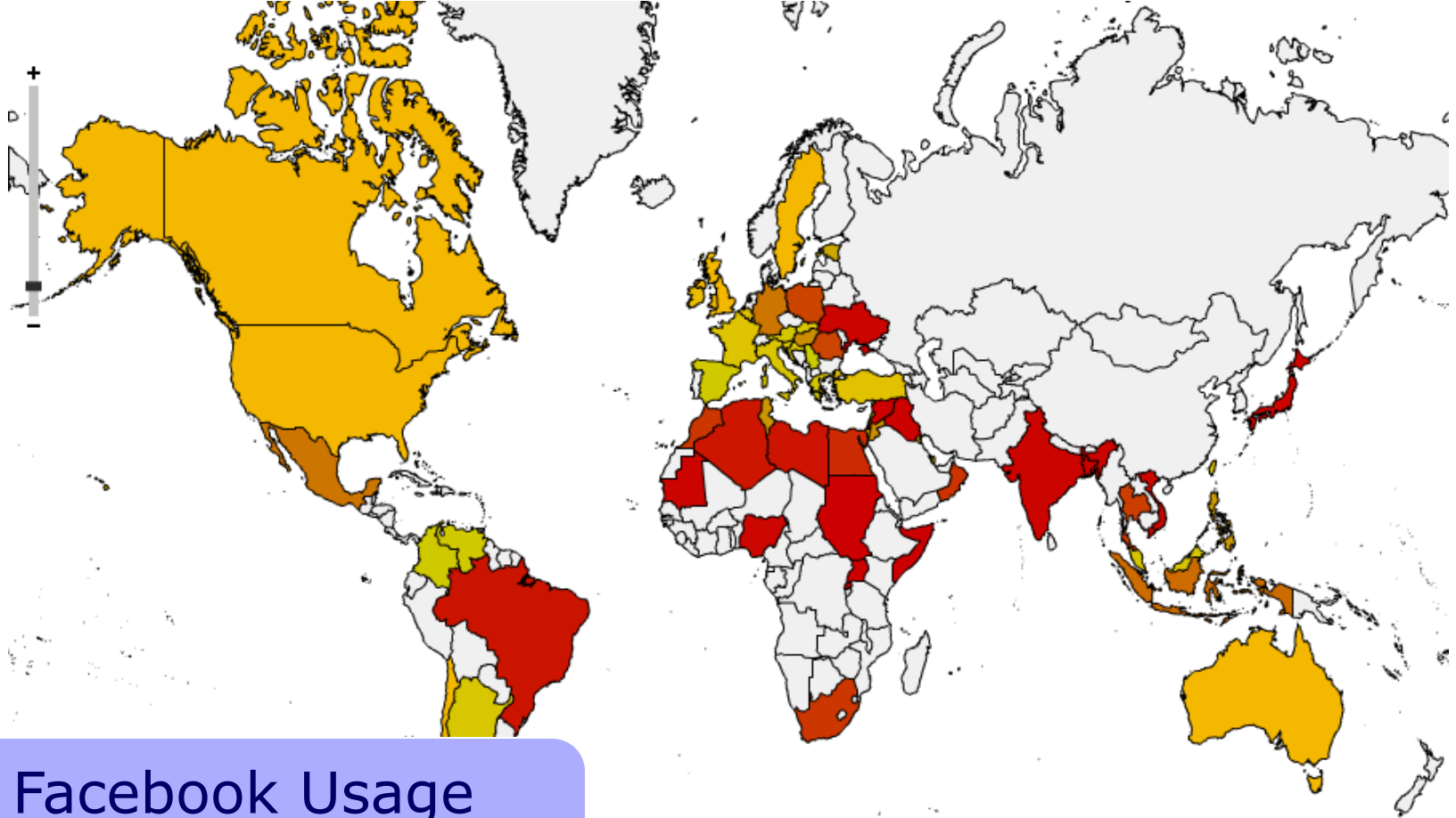
James Gwertzman
VP Asia/Pacific
james@popcap.com

GDC



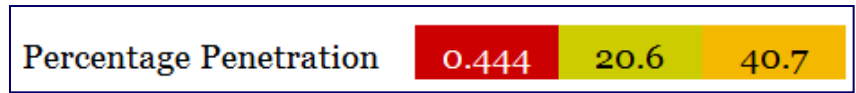
A close-up, high-contrast photograph of a person's face, focusing on the eyes and nose. The person has light-colored eyes and dark hair. The image is overlaid with large, white, sans-serif text. The text is arranged in two lines: the top line reads "500 MILLION" and the bottom line reads "FRIENDS". The text is centered horizontally and partially obscures the person's facial features.

500 MILLION
FRIENDS

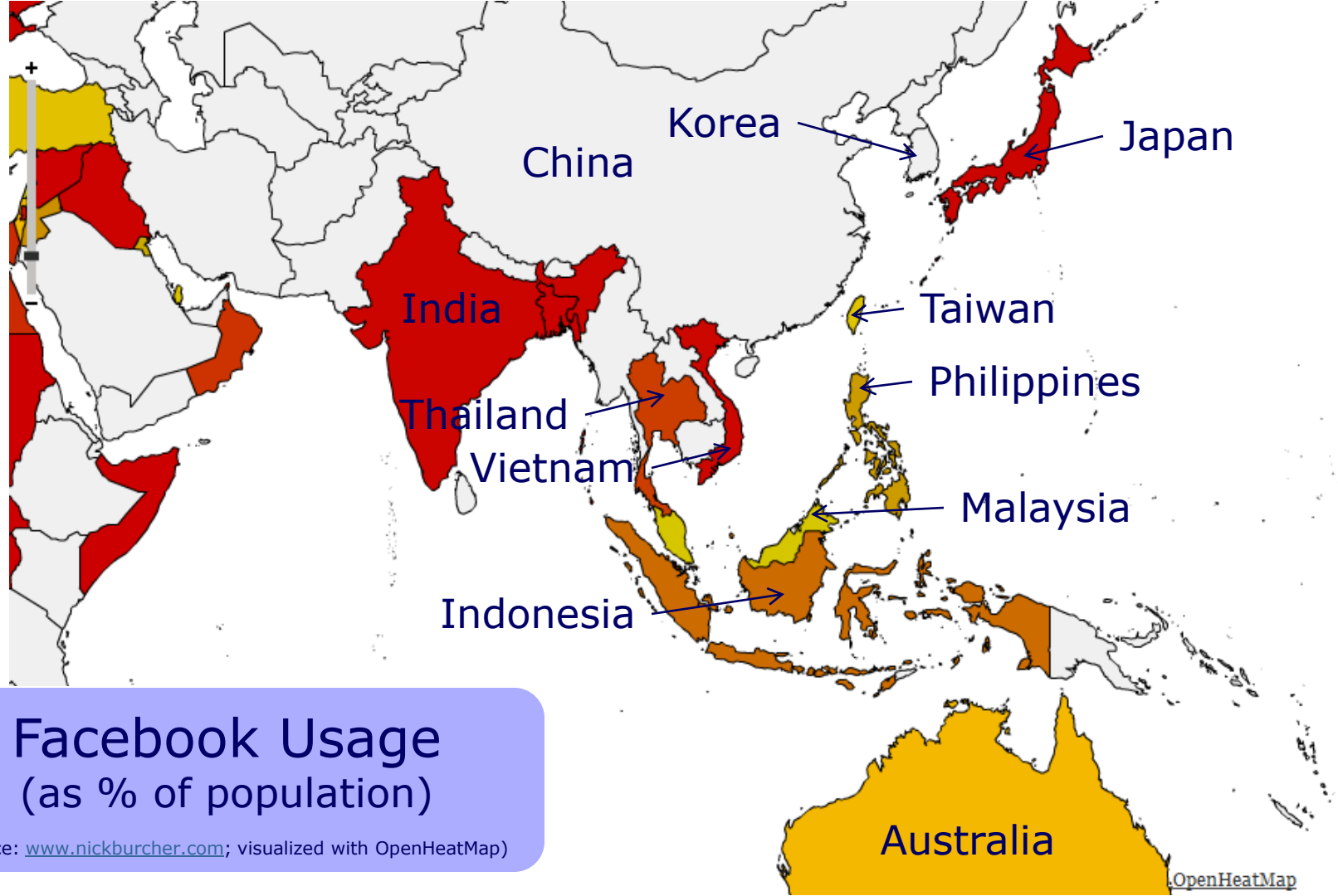


Facebook Usage (as % of population)

(source: www.nickburcher.com; visualized with OpenHeatMap)

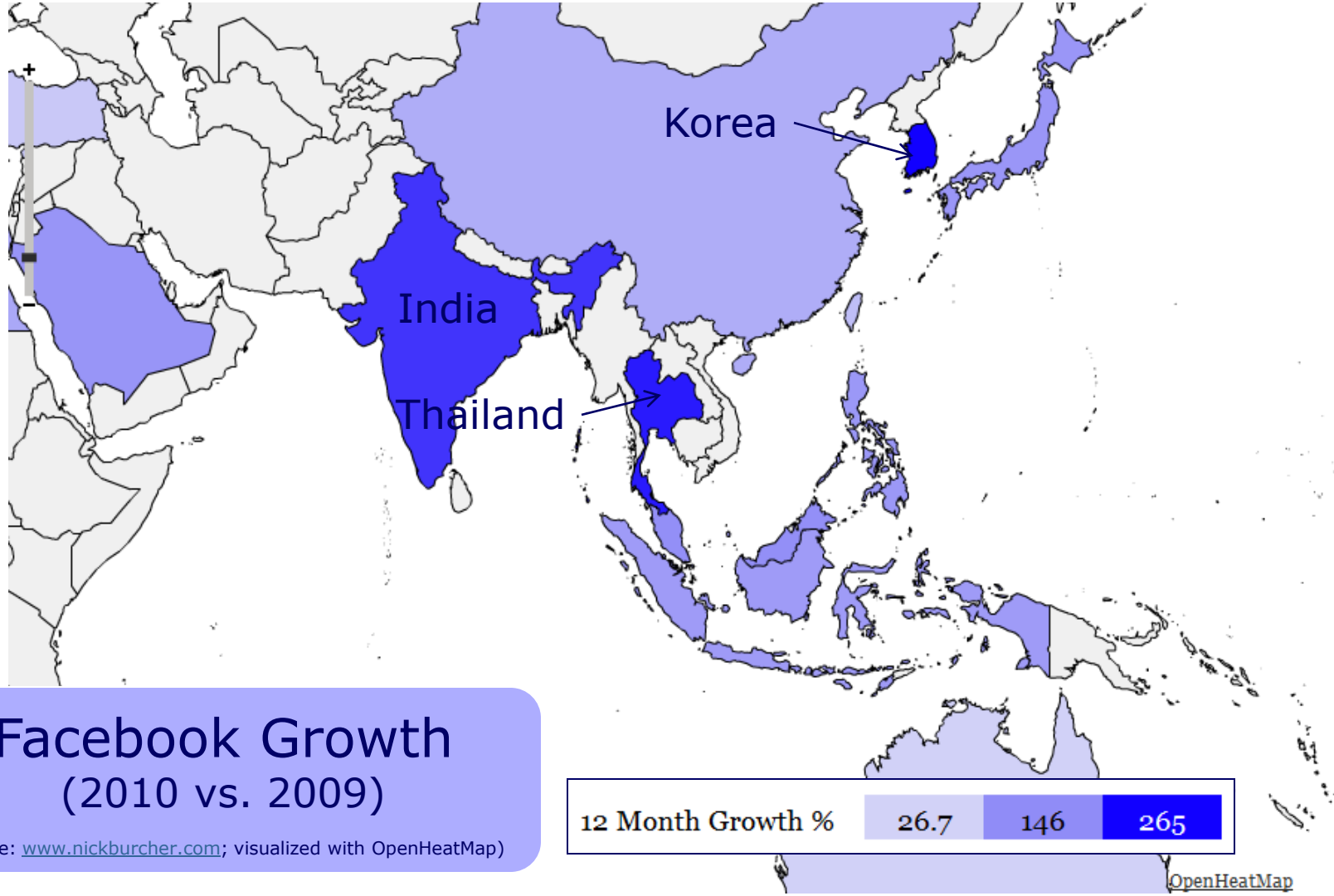


OpenHeatMap



Facebook Usage (as % of population)

(source: www.nickburcher.com; visualized with OpenHeatMap)



Facebook Growth (2010 vs. 2009)

(source: www.nickburcher.com; visualized with OpenHeatMap)



Internet Explorer cannot display the webpage

What you can try:

[Diagnose Connection Problems](#)

 [More information](#)



China Market Overview



Many competing platforms



Heavily regulated
(esp. for foreign companies)



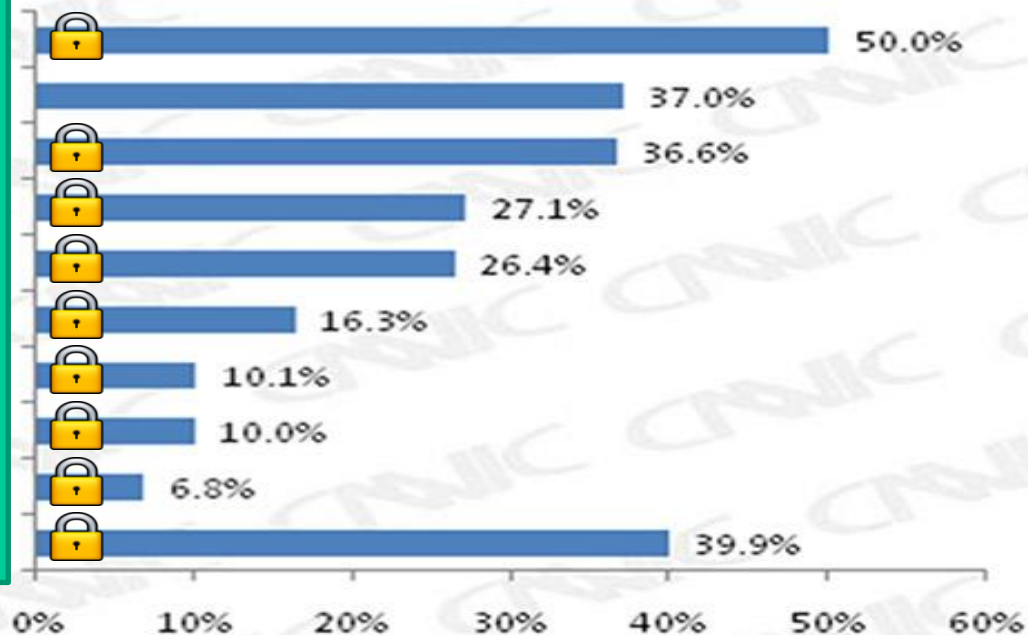
High DAU; Low ARPU



Predominately PC focused



QZone
RenRen.com
Sina Space
51.com
Kaixin001.com
Sohu
Douban.com
139.com (mobile)
Kaixin.com
Other





User behaviors

China's platforms

👤 Stealing



Facebook

👤 Cooperating





Art style

China



Facebook

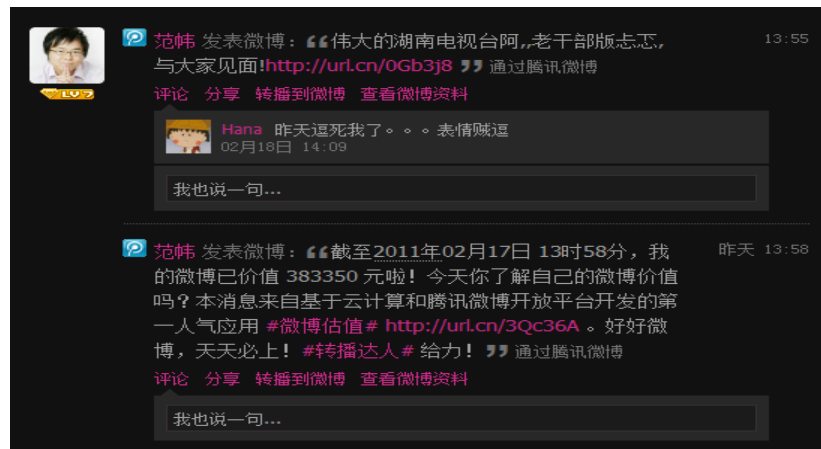




Viral feeds

QZone

- ⊗ No app feeds



RenRen

- ⊗ App Feeds
- ⊗ App Invites

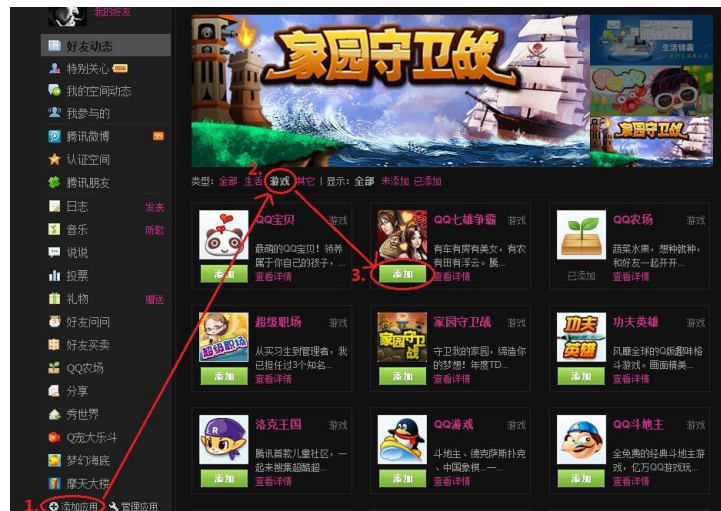




App Discovery

QZone

- App Directory
- Banner Ads



RenRen

- App Directory
- Ads





Platform currency

QZone



收藏本页

首页 金币交易 装备交易

游戏名称: [下拉菜单] | 全部分类

热门游戏: 魔兽世界(国服) 地

手机 QQ 点卡

QQ号码: [输入框]

充值类型: [下拉菜单: Q币充值]

充值面额: [下拉菜单: 10个]

应付金额: 8.95元

确定购买

闪电到账, 5173自动充值大卖场!
热门激活码/新手卡购买

网游便民中心

☐ 点卡 ☒ QQ ☐ 网游物品

种类: [下拉菜单: Q币]

面值: [下拉菜单: 1个]

查看折扣价 **上手机淘宝**

买QQ 上淘宝

RenRen



银行卡 支付宝 手机充值卡 手机话费 MyCard (台币) 人人/骏网一卡通 固定电话 其他充值方式

主通道 备用通道1 备用通道2

UnionPay 你选择了 **银行卡** 方式充值人人豆, 请填写以下信息:

人人豆数量: ☒ 10个 (10元可充10个人人豆)
☐ 20个 (20元可充20个人人豆)
☐ 30个 (30元可充30个人人豆)
☐ 50个 (50元可充50个人人豆)
☐ 100个 (100元可充100个人人豆)
☐ 500个 (500元可充500个人人豆)
☐ 1000个 (1000元可充1000个人人豆)

选择银行: ☒ 中国工商银行 ☐ 中国农业银行 ☐ 交通银行
☐ 招商银行 ☐ 中国建设银行 ☐ 中国银行

+ 其他银行

☒ 人人豆到账后自动兑入Q将三国

去银行充值

选中此项, 我们会在您充值到账后, 将10个人人豆直接兑入Q将三国 (10)。届时您的账户余额为 0 个人人豆。



Happy Tower

"Farmville meets Cake Mania"

- ③ Manage a shop
 - ③ Service your customers
 - ③ Steal from your friends
-
- ③ DAU: 15M
 - ③ ARPU: \$.005 / DAU
 - ③ Monthly revenue: \$2.5M





Core Mechanic

1. Rent a floor to open a shop
2. Serve guests and get coins
3. Spend coins to upgrade and expand
4. Steal coins and guests from friends
5. Finish daily tasks for bonus rewards





Business Model

- ③ Buy items to:
- ③ Attract more customers
- ③ Shorten service time
- ③ Improve customer satisfaction





Viral Growth

⊕ Friend invites





Fantasy Seabed





Business model

- ③ Buy items to:
- ③ Shorten growth time
- ③ Extend harvest time
- ③ Buy special fish





Viral Growth

⊕ Friend Invites





Little War

- ③ Grow, decorate village
- ③ Make war on others
- ③ Build magic powers
- ③ Prank friends





Business Model

- ⦿ Buy:
- ⦿ Building materials
- ⦿ Magic energy
- ⦿ Special decorations
- ⦿ Shorten growth time





Viral Growth

- Friend invites
- Form feeds





Japan Market Overview



Mobile Phone ("Gala-kei")
Implementations



Limited social features:
activity feeds,
messaging, avatars



High (US\$2-\$3) ARPU



GREE vs DENA : Feature Phone



As of Feb 7, 2011

Dragon Collection



100 Mannin No Sangokushi



Omiseyasan



Love&Job! Otona No Jijyou



Shirotsuku

1

As of Feb 11, 2011

Kaitou Royale

2

Nouen Hokkorina

3

Kaizoku Treasure

4

Hoshitsuku

5

El Ark



- **More collaborative** games
- Few titles from GREE
- Titles related to “love” and “boy” are popular
- More like Sony Computer Entertainment



- **More competitive** games
- Top 5, all from DeNA / 8 DeNA titles in Top 10
- More like Nintendo





Dragon Collection

- Card collection and battle game
- Popular with women as men



Kaitou Royale

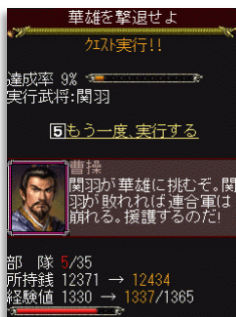
- "Mafia Wars" style RPG
- "Mafia Wars" not popular in Japan
- Released as "Bandit Nation" in US; not especially successful





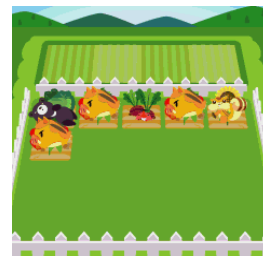
100 Mannin no sangokushi

- ③ “Strategy RPG” game
- ③ Reunify ancient China
- ③ Simple battle mechanics; no real fight interaction



Nouen Hokkorina

- ③ Farming game





Omiseyasan

- Shopkeeper game
- Visit friends' shops, etc



Kaizoku Treasure

- Seafaring Pirates
- Ship Battles
- Treasure hunting





Love&Job! オトナの事情

Love & Job! Otona no jijyou

- Life drama game
- Main character works in nail salon
- At the turning point of your life, choose between love and job!
- Pay per-episode model



Hoshitsuku

- Planet-building game
- Develop the culture on your planet
- Spend energy to go to other players' planets and find items
- Use found items to boost your culture





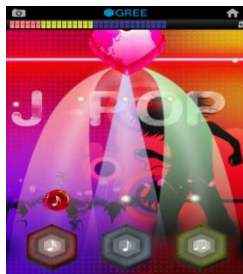
GREE vs DENA : SMARTPHONE



In service now
Flash emulation
Original web browser
Native apps for Gree API



Web based
Flash Emulator



Native App
calls GREE API



To be launched on April
Using NG moco's engine
"ngCore", which is
Android-iPhone cross-
platform capable



GREE vs DENA : PC SOCIAL



	China	Japan	US
PC		No Game but simple SNS	
WAP		GREE	
Smartphone	GREE platform for Smartphone with Tencent	GREE platform for Smartphone	GREE platform for Smartphone as GREE USA

Focusing on
smartphone, not PC

	China	Japan	US
PC		Yabage with Yahoo!	
WAP		Mobage	
Smartphone	WAPTX Smartphone with tx.com.cn	Mobage Smartphone with ngmoco	Plus+ Network with ngmoco

Partnering with Yahoo
(Yabage) to go after PC



App Discovery & Virality

- ③ Discovery through promotion or charts (new, top selling, recommended)
- ③ Virality limited to activity feeds & messaging
- ③ Low click-through on game-related invites (25%)



Q4 2010 Mobile & PC trends

Mobile

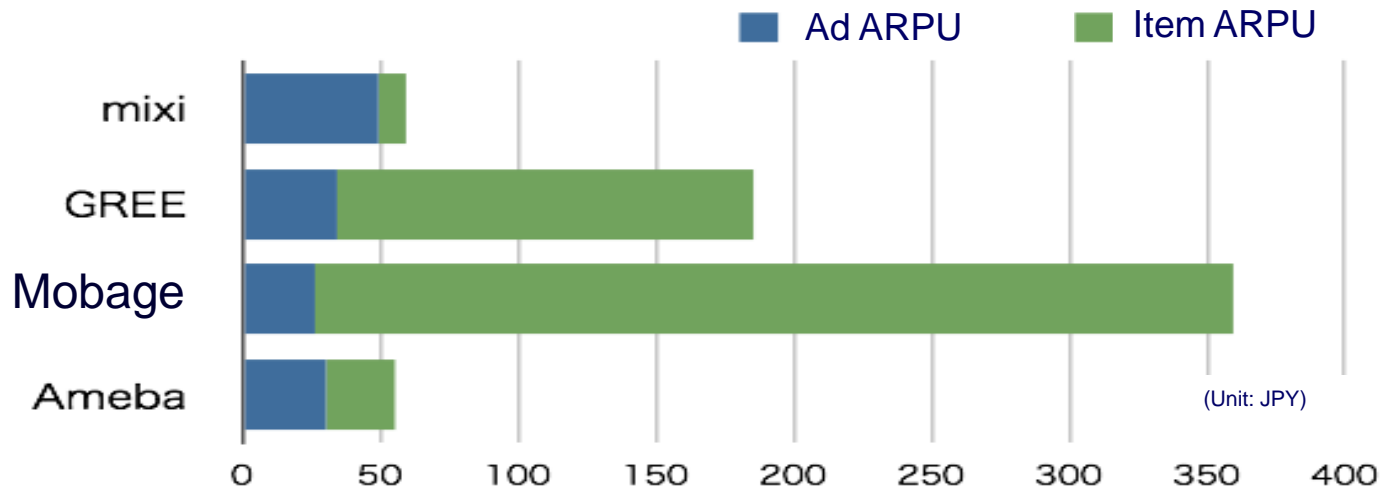
ドメイン	Reach rate	Average PV	Minutes spent
mixi mobile	28.4%	1,285	670
GREE	36.1%	3,959	936
mobage	30.6%	7,741	1,319
Ameba mobile	33.1%	1,400	366

PC

ドメイン	Reach rate	Average PV	Minutes spent
mixi	16.5%	306	182
Yabage	6.5%	428	206
Ameba pigg	4.5%	25	19
Hangame	3.8%	213	151



Q42010 ARPU





Western Companies Competing in Asia

Zynga

- ⌚ China: purchased Beijing social game studio (XPD); developing primarily for Facebook
- ⌚ Japan: \$150M Softbank investment;; bought 120 people studio (Unoh); launched Farmville on Mixi platform (PC); working on mobile titles

Crowdstar

- ⌚ Partnership with Drecom in Japan to launch social titles on mobile

EA

- ⌚ Growing Playfish Beijing studio; opening iPhone studio in Beijing; planning to enter China market

PopCap

- ⌚ Built 80 person Shanghai studio; partnering in Japan, Korea, China
- ⌚ Announced social-mobile "PopTower" project for Japan

最近使用
我的收藏



首页 个人主页 好友 应用 游戏

站内信 搜索 找人、公共主页、游戏 帐号



邀请好友

收藏游戏

成为粉丝

论坛

常见问题



你知道吗？每周三的0:00点，你的排行榜分数会刷新，想做常胜将军可不是那么容易的哦~

新高分

26,150 分

本次得分在所有玩家中排名 64.93%



发布到首页

分数 速度 火焰 x1 闪电 x0 超能 x0

得分统计



再次挑战

1		郭翰霆 26,150	★
2		柴泽华 这周没玩过	★
3		宝开 这周没玩过	★
4		杜娟 这周没玩过	★
5		谭溪 这周没玩过	★
挑战好友			



小小战争



进入应用

摄魂



你能看到灵魂出窍吗？据说每个人的灵魂都是有重量的。

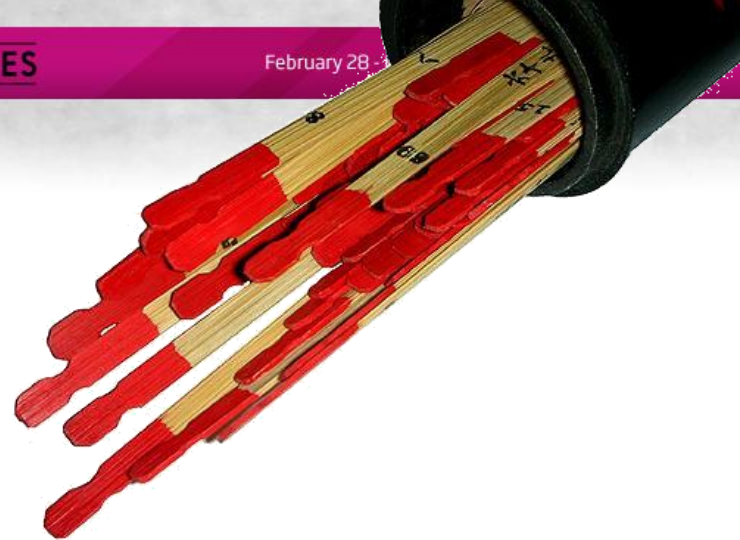
Q版地下城与勇士



体验2D横版游戏的连击快感，尽在Q版地下城与勇士！

神秘利器





Predictions...

- ⌚ <\$100 Android handsets
- ⌚ Huge competition on social/mobile in China
- ⌚ Facebook will partner to enter China



Questions?