Online Gaming Market in China 2012

Description: The online gaming market in China is poised to grow with a staggering CAGR of 40% during 2009-2015.

The report begins with the market overview of online gaming market in China, providing details on the domestic online gaming industry size in terms of online gaming market value and its growth. It also mentions the size of the online gamer base and its growth over past few years. The share of online gaming market revenue earned from mobile network and internet has been included in this section which is followed by an illustration of the online gaming industry business model wherein it depicts the structure of the market, including the most popular business models adopted by the market players. Another detailed illustration about the types of online games is also included in the report. There are primarily five types of online games, including massively multiplayer online game, first-person shooter, racing/simulation game, adult/gambling game and puzzle/strategy game.

Factors driving the growth of online gaming market in China are also explained in detail. Increasing internet usage coupled with growth in broadband subscribers is providing impetus to the growth in online gaming market. China has the world's largest internet user base, representing 23% of the global online population with a broadband penetration set to grow with a CAGR of atleast 21%. Rising personal computer sales will lead to increasing demand for online gaming while growing revenues from in-game advertising will allow online game operators to diversify their revenue generation source. Growth in mobile internet users provides future growth prospects for the market as mobile internet users have been growing at a CAGR of robust 45%. Diversified product portfolio of domestic players leads to the availability of affordable online gaming.

The players operating in the market also face challenges which are impeding their development and growth. Fragmented regulatory framework and cumbersome market entry procedures have been identified as major challenges, restricting the entry of foreign players in the domestic online gaming industry. Demographic challenge is held responsible for slower market growth rate. School-age population is expected to represent only 17.7% of the total population of China by 2020. There has been several anti-game addiction program adopted by the government that considerably restricts minors from indulging into online gaming. Fear of online gaming fraught by cyber criminals is also a cause of concern for the consumers. Limited enforcement of intellectual property rights results in large no. of pirated online games in China. Human resource constraints act as a challenge for the online game developers. Low internet penetration level compared to other countries hinders market expansion of online gaming industry.

The report also mentions the government's key focus areas in the online gaming sector, for supporting the sustainable development of the overall online gaming industry.

Emerging trends in the online gaming market include growth in pre-paid gaming cards, focus on research and development, focus on online 3D games and overseas expansion. Players are investing in R&D, introducing more and more online 3D games and also upgrading the existing 3D games, as a step towards further development of the current technological standards. Export of online games has grown at CAGR of 82%.

Mergers and acquisitions section highlights some of the major M&A deals made recently in the Chinese online gaming market. This section covers information on the parties involved alongwith the deal size and transaction time it took for completing the deal.

The competition section outlays the competitive landscape of the online gaming industry in China briefing about the domestic and foreign players existing in the market. This section provides a three dimensional analysis of domestic key players’ revenues, profits and market capitalization. The key domestic players are ranked according to the total income and net profit. The report also features brief profiles of major domestic and foreign players in the market and a snapshot of their corporation, financial performance along with the key financial ratios, business highlights and their product portfolio providing an insight into the existing competitive scenario.

Some of the key statistics or factors impacting the online gaming market in China covered in the report includes domestic market size, revenue share, online gamer base, business model and types of online
games, internet population and penetration, average time spent on online gaming per week, share of internet users playing online games, purchasing virtual currency and online games, broad band user base, average internet access speed for top five province, personal computer sales volume and personal computer online games market size, online advertising market size, mobile internet users and share of total mobile internet users accessing online games, country wise comparison of internet users and penetration, revenues earned from online exports and no. of Chinese online games sold to the international markets.

Key takeaway section summarizes the entire market in terms of opportunities, trends and challenges persisting in the online gaming market in China.

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