

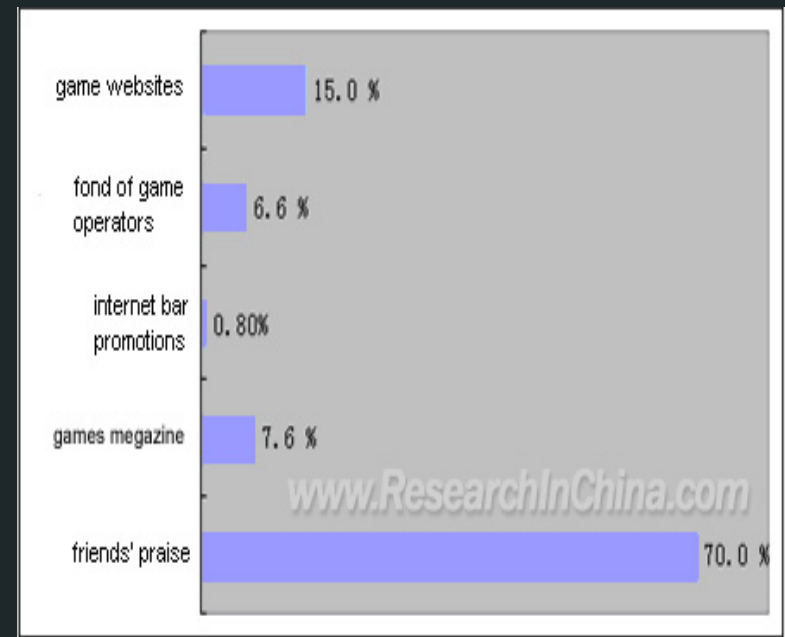
China Online Games Market Report, 2007-2008



- China's sales revenue of online games market reached CNY10.57 billion, up 61.5% year on year. Of which, CNY6.88 billion were the sales revenue from online games developed independently by Chinese companies, amounting to 65.1% of the national total, a big jump of 65.1% year on year compared to CNY4.24 billion recorded in the previous year. This the third year in a row that sales revenue of China's independently developed online games dominated the local market. However, the market shares of China's top three online games developers, Shanda, Netease and Giant, began to decline, as more and more local companies with independently developed online game products have taken part in the market competition. More online game companies grabbed the market shares from the top three giants by use of the success of only one or two online game products, resulting in a further decline in industry concentration. As of December, 2007, the number of China's online games users has reached 40.17 million, up 23% year on year.

- In 2007-2008, ResearchInChina surveyed online game players in Beijing, Shanghai, Tianjin, Wuhan, Harbin and Jinan via online and offline questionnaires and recovered a total of 1,000 valid questionnaires. Based on our investigation, we find the percentage of influence that makes players decide to play which games as follows; friends' praise amounts to 70%, followed by the influence of game websites, online game magazines 7.6%, fond of game operators 6.6% and promotions by internet bars 0.80% only.

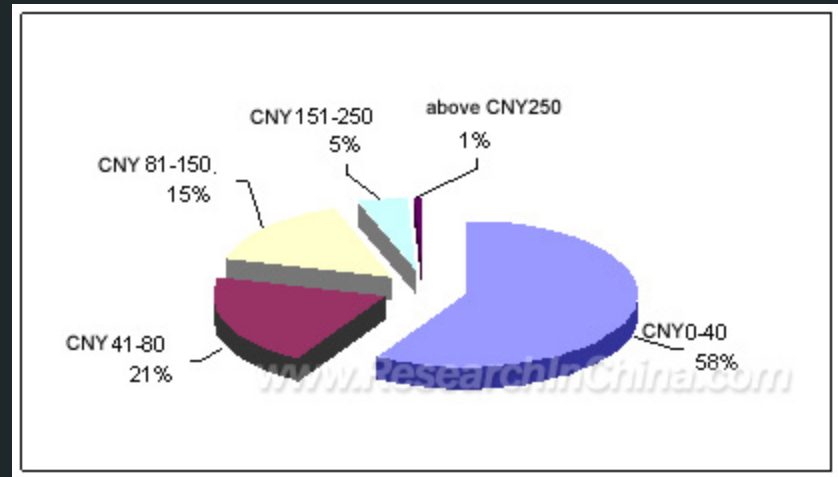
Influence Deciding to Play Which New Games



Source: ResearchInChina

- Monthly spending of a game player on online games is about CNY140.13 (including internet fee in internet bar but excluding internet fee via computers at home). Monthly spending, ranging CNY0-CNY300, amounts to 89% of the total market. Of which, monthly spending, ranging CNY0-CNY100, takes up 60.40%; that, ranging CNY300-CNY500, 8.8%; that above CNY500 2.2% only. Furthermore, 70.40% of game players believe that their spending on online games in 2007 would be higher than that in the previous year.

Percentage of Online Game Players' Spending on Virtual Props



Source: ResearchInChina

- Our survey also shows that the average spending players spend on virtual props is CNY49.77, of which, spending, ranging CNY0-CNY40, takes up 58% of the total; that, ranging CNY41-80, 21%; that, ranging CNY81-150, 15% and that above CNY151, only 6% respectively.

Free-mode was popularized within this industry in 2006 and it has become a historic turning point. After this revolution, China online game market has had a new round of rapid growth.

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