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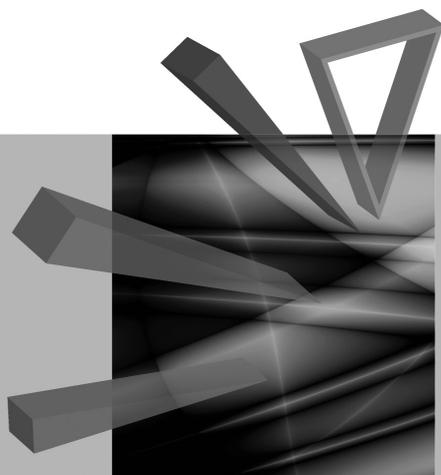
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edited by

Anna H. Jankowiak

Szymon Mazurek

Bogusława Skulska



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Copy-editing: Agnieszka Flasińska

Layout: Barbara Łopusiewicz

Proof-reading: Barbara Łopusiewicz

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Tomasz Bieliński

University of Gdańsk

DEVELOPMENT OF INTERNET SOCIAL NETWORKS IN CHINA AS A CHANCE FOR EUROPEAN SOFTWARE DEVELOPERS

Abstract: As Internet social services gain popularity all over the world, software developers search for business opportunities in this dynamic market. The aim of this article was to establish if Chinese social services market can be treated as a chance for development for European software producers, and what part of this market would be the most attractive. Analysis of data on the growth and structure of social media in China has shown that it is potentially the biggest in the world. Further study of global and Chinese markets revealed that the part of social media market that may be the most promising for European software developers is the market of social applications for mobile phones. A case study of a German company Handy Games that succeeded in entering Chinese social media market proves that this kind of expansion is possible.

Keywords: social network, social service, Chinese Internet, mobile phone application, software developer.

1. Introduction

The Internet social network services market is one of the fastest growing in the world. In 2011 as much as 66% of Internet users globally used social media.¹ Recent research has shown that also a remarkable 83% of companies all around the world use at least one social technology.² Social networks operate not only as websites that earn their income by selling services (like advertising), but also as platforms for other companies that build programmes to provide services for social networks users. Ranging from social communities and discussion groups, to recommendation engines, tagging systems, mobile social networks, games, and virtual worlds these programmes have transformed traditional application paradigms such as the way users communicate and navigate in the Internet.³

¹ *Global Entertainment and Media Outlook: 2011–2015*, PricewaterhouseCoopers, 2012, p. 34.

² J. Bughin, M. Chui, Social technologies: Crossing the next threshold, *McKinsey Quarterly* 2013, no. 1, p. 76.

³ M. Faloutsos, T. Karagiannis, S. Moon, Online social networks, *IEEE Network* 2010, vol. 24, no. 5, p. 4.

The aim of this article is to verify if Chinese social network websites can become an attractive market for European software producers. Additional goal of this article is to identify which part of social network websites market can be considered as the most promising for European software developers.

2. Development of Internet social media market in China

During recent years social media services in China went through a period of fast development and growth.⁴ Unfortunately there is a lack of reliable data sources that could show how big the market is and how many people in China use social service portals. Statistics differ from each other because agencies and companies use different methodology and sources. According to governmental Statistical Report on Internet Development in China there were 275 million active users of social networking websites in the end of 2012, which represented 48.8% of all Internet users in China and was 12.6% more than the year before.⁵ On the other hand, *Social Media in China – Statistics and Trends* report estimates that there were 597 million active social networking users in China in March 2013 (which was 91% of all Internet users), and the volume of social sharing went up by 60% in 2012.⁶

The second estimation seems to be more reliable, as the financial report of Chinese software company Tencent shows that by the end of 2012 there were more than 600 million active user accounts of their social service website.⁷ Such a big difference between the numbers might result from different definitions of active users.⁸ The numbers might not be entirely reliable, but still they show the structure and potential of the Chinese social media market.

The company that is the most successful on the Chinese social network services market is Tencent, developer of several largest social websites like Qzone, Tencent Weibo, Wechat and Pengyou. Qzone is similar to Facebook, giving users the ability to create and share profiles, publish photos or play games. Tencent Weibo is a microblogging website similar to Twitter. Wechat is a mobile phone text and voice messaging communication service, and unlike other major Chinese social websites

⁴ J. Lagerkvist, New media entrepreneurs in China: Allies of the party-state or civil society?, *Journal of International Affairs* 2011, vol. 65, no. 1, p. 169.

⁵ *Statistical Report on Internet Development in China January 2013*, China Internet Network Information Center, Beijing 2013, p. 47.

⁶ *Social Media in China – Statistics and Trends*, GO-Globe.com, 2013, <http://www.go-globe.com/blog/social-media-china/> (retrieved 18.04.2013).

⁷ *Tencent Announces 2012 Fourth Quarter And Annual Results*, Tencent, 2013, p. 2.

⁸ Some companies treat as an active user everyone who logs in at least once every 30 days, once a week or once a day. Active registered users might also be defined differently by many sources. Some people register their accounts on many websites, but then they forget about them, and do not use them on the daily basis. Additionally there are people that keep more than one active account on social service website. Moreover some of the active accounts are used by companies, not by people, and that can partially explain why there were more active accounts than people using Internet in China in 2012.

it is available in many languages.⁹ Wechat was created for the growing market of smartphones and it is available for iPhone, Android, Windows Phone, Symbian, and BlackBerry platforms.¹⁰ On the most of largest social websites users log in and operate under nicknames, Pengyou, on the other hand, requires real name, education and work background to open an account, and that makes this Tencent product more interesting for companies which want to promote themselves in the Chinese market.¹¹ The largest competitor of Tencent is Sina Corp, the owner of another microblogging network Sina Weibo.¹² With around 500 million registered users it was the third social networking site in China in the end of 2012. Other big social networking websites are 51.com (web-gaming community), RenRen, Kaixin001, Jiayuan (dating service), Douban, and as Chinese market is very dynamic they can also become major players in near future (Figure 1).

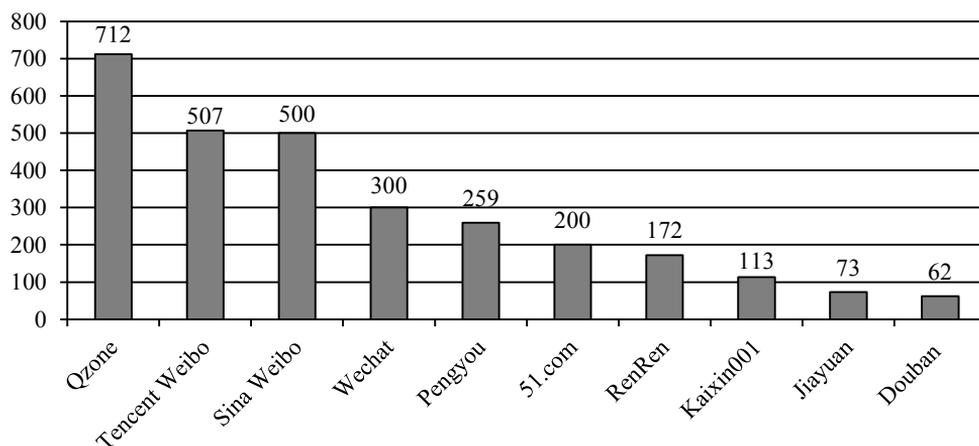


Figure 1. Estimated number of registered users (in millions) of the top 10 social networking sites in China in March 2013

Source: *Social Media in China...*

What is the most interesting about Chinese social media market is that it is dominated by local companies and foreign competition is insignificant. The major reason for that distinction is that world's leading social network services Facebook

⁹ S. Millward, *Next Version of WeChat App Will Add Voice Chatrooms, Song Recognition*, January 17th, 2013, Tech in Asia, <http://www.techinasia.com/next-version-wechat-app-voice-chatrooms-song-recognition/> (retrieved 20.04.2013).

¹⁰ <http://www.wechat.com> (retrieved 20.04.2013).

¹¹ S. Ye, *PengYou: Tencent's Latest Real Name Social Network*, May 1st, 2011, <http://techrice.com/2011/01/05/pengyou-tencents-latest-real-name-social-network/> (retrieved 21.04.2013).

¹² Z. Nooruddin, L. Zhang, 7 steps to Weibo success, *China Business Review* 2012, vol. 39, no. 3, p. 42.

and Twitter¹³ were blocked by Chinese government.¹⁴ The access to the world's most popular social service websites was blocked in 2009 after riots in Chinese western region of Xinjiang,¹⁵ when the government found that "Xinjiang independence" activists were using these portals to facilitate their communication.¹⁶ Chinese social services websites implemented the system of self-censorship so the government does not restrict their operations.¹⁷ Other global major players like LinkedIn or Myspace did not succeed on Chinese market due to tough competition of local companies.¹⁸ There is no European social service website that could compete with Chinese networks, and as the market is close to saturation (around 91% of people that have access to Internet are active users of at least one social network), entering it would be very risky. On the other hand, the development of the big social networks creates a chance for software developers who would use them as a platform for their products. This leads to the conclusion that not the social services market itself, but the market of applications which use community websites as distribution platforms might be the most promising for European software providers.

3. Revenues of Chinese Internet market as a major factor influencing its attractiveness for European software providers

To verify if Chinese social services market can be considered as an opportunity for European software producers it has to be investigated if companies operating on that market may expect substantial revenues.

Chinese Internet economy during the years 2006–2011 grew on the average pace of 48.8% yearly reaching RMB 249.9 billion in the end of that period (which was around USD 40.5 billion). The crisis seen in the other sectors of economy barely touched revenues of Chinese Internet market slowing the growth down from 52.1% in 2008 to 40.1% in 2009 (Figure 2).

After two years the growth speeded up to 66.9% in 2011, making Chinese Internet economy one of the fastest growing in the world.¹⁹ Although according to

¹³ *Top 15 Most Popular Social Networking Sites April 2013*, eBizMBA, <http://www.ebizmba.com/articles/social-networking-websites> (retrieved 23.04.2013).

¹⁴ S. Greengard, Censored!, *Communications of the ACM* 2010, vol. 53, no. 7, p. 16.

¹⁵ R. Wauters, China blocks access to Twitter, Facebook after riots, *Techcrunch* 2009, July 7th, <http://techcrunch.com/2009/07/07/china-blocks-access-to-twitter-facebook-after-riots/> (retrieved 23.04.2013).

¹⁶ 80 pct of citizens agree China should punish Facebook, *The People's Daily Online* 2009, July 10th, <http://english.people.com.cn/90001/90776/90882/6697993.html> (retrieved 23.04.2013).

¹⁷ T. Zhu, D. Phipps, A. Pridgen, J.R. Crandall, D.S. Wallach, *The Velocity of Censorship: High-Fidelity Detection of Microblog Post Deletions*, Arxiv, 2013, p. 10.

¹⁸ K. Lukoff, MySpace's sorry failure in China (Or what Facebook should not do), *TechRice* 2011, October 4th, <http://techrice.com/2011/04/10/myspaces-sorry-failure-in-china-or-what-facebook-should-not-do/> (retrieved 20.04.2013).

¹⁹ *2012 China Internet Economy Report (Brief Edition)*, iResearch Consulting Group, Beijing 2013, p. 8.

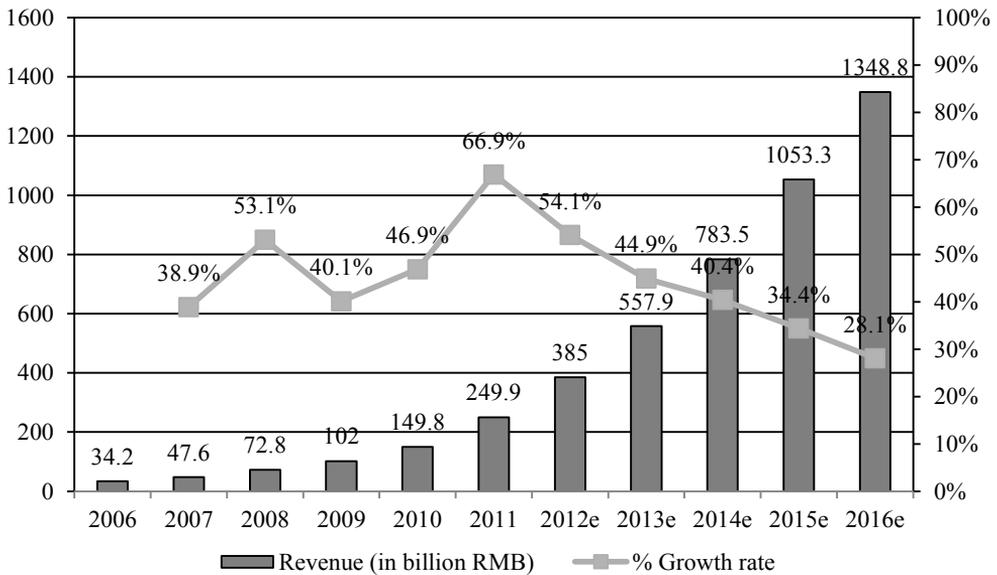


Figure 2. Revenue of China Internet economy in RMB billion 2006–2016

Source: *2012 China Internet Economy Report (Brief Edition)*, iResearch Consulting Group, Beijing 2013, p. 8.

the iResearch forecast the growth will systematically slow down, the market is expected to grow up to RMB 1.3 trillion in 2016 (which was around USD 218.5 billion in 2013). This extraordinary development gives European software producers who would like to enter this market great growth opportunity.

4. Development of the market of social media applications for mobile phones in China as an opportunity for European software producers

Analysis of global and Chinese Internet market may lead to the conclusion that the most promising part of the social media market for European software producers might be the one that connects social media with mobile phone applications.

Rapid development of smartphone and tablet market brought now opportunities for software developers all around the world. Completely new market of applications for mobile devices emerged and is growing at unexpected pace.²⁰ According to the PricewaterhouseCoopers report²¹ in the beginning of 2011 about 300 thousand apps

²⁰ W. Hsiu-Yu, L. Chechen, Y. Ling-Hui, What affects mobile application use? The roles of consumption values, *International Journal of Marketing Studies* 2013, vol. 5, no. 2, p. 11.

²¹ *Global Entertainment...*, p. 30.

were available to iPhone users, and around 130 thousand to users of Android-powered devices.

Nearly 11 billion of mobile applications were downloaded in 2010—and while most are free of charge, there is a growing number of those that are available only for a fee (Figure 3). Global spending on such applications totalled about USD 7 billion in 2010, up from USD 4 billion in 2009. The most interesting part of this market is the connection between growing number of mobile Internet users and social network users. According to Mobile Web Watch 2012 report 62% of mobile Internet users access online communities, and 80% of them do so more than once a week. What is more, 71% of mobile Internet users have downloaded applications on their mobile device.²²

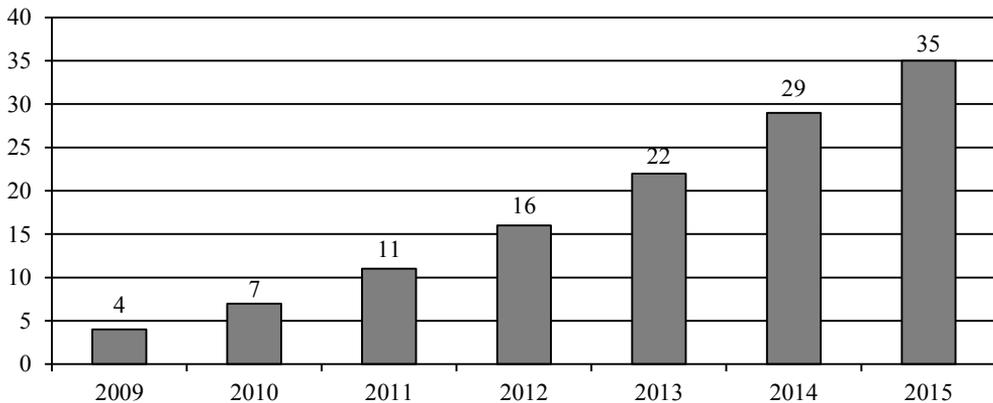


Figure 3. Global spending on mobile applications in billions of USD (estimation starts in 2011)

Source: *Global Entertainment...*, p. 30.

Software that connects mobile phones and tablets with social networks is one of the fastest growing segments of the mobile applications market. PricewaterhouseCoopers forecasts that global spending on programmes dedicated for mobile phones will grow up to USD 35 billion in 2015. The market of mobile applications has the most promising future in China, where mobile Internet use was already more popular than traditional desktop computer or laptop access in 2012.

Percentage of users accessing Internet by desktop or laptop computers in China is systematically going down, whereas share of people using their mobile phones to connect with the web is growing dynamically. By the end of 2012 as much as 74.5% of Internet users accessed it by mobile phones (Figure 4). This characteristic of Chinese market makes mobile phone applications for social services a very promising market. Major social services providers in China understand it and architected their

²² N. Mohr, E. Lalloz, D. O'Brien, *Mobile Web Watch 2012 Mobile Internet – Spawning New Growth Opportunities in the Convergence Era*, Accenture, 2012, p. 11.

products in a way that they can be used on mobile phones. For example Qzone can be used on iPhones, iPads, phones operating systems like Android, Windows Phone, and even cheap models with 2G plans.²³

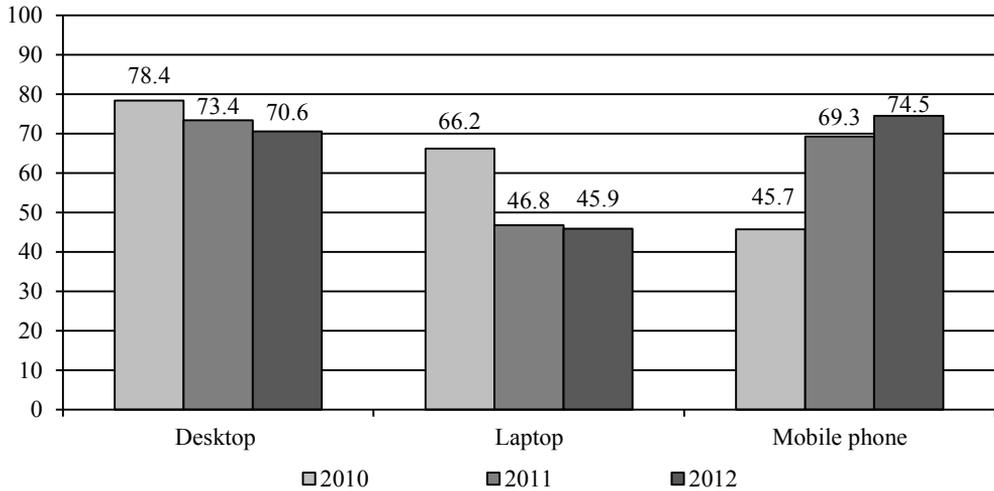


Figure 4. Percentage share of Internet access devices in China

Source: *Statistical Report on Internet...*, 2013, p. 28, *Statistical Report on Internet Development in China January 2012*, China Internet Network Information Center, Beijing 2012, p. 19.

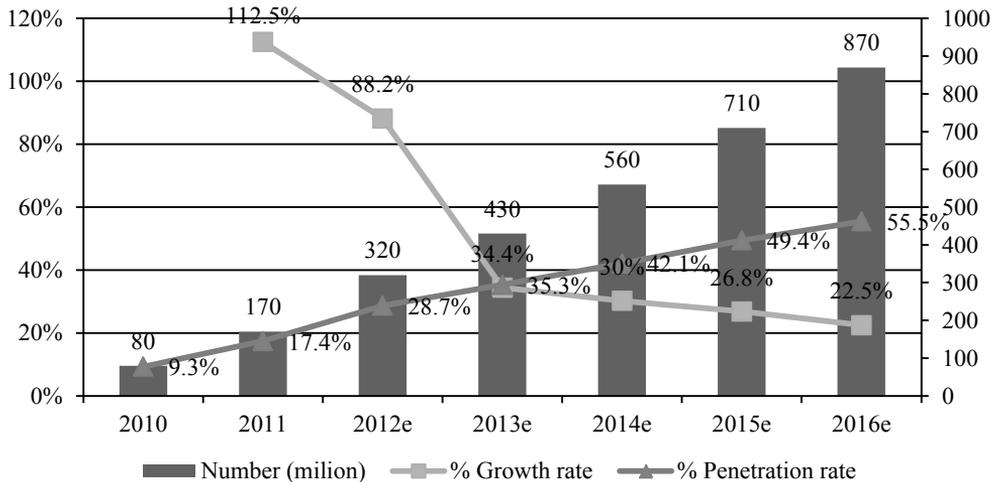


Figure 5. Number of smartphones in use in China, growth rate and market penetration rate (estimation starts in 2012)

Source: Y. Weiqing, *2012–2013 China Mobile Payment Report (Brief Edition)*, iResearch Consulting Group, Beijing 2013, p. 6.

²³ Qzone, Tencent, 2013, <http://qzone.qq.com/> (retrieved: 24.04.2013).

Expansion of smartphone market in China will be probably one of the major factors of growth for the social network services. China Mobile Payment Report reveals that in 2011 there were 170 million smartphones in use in China, 112.5% more than the year before. According to iResearch estimation this number will go up to 870 million in 2016 (Figure 5).

In 2011 smartphones constituted only 17.4% of mobile phone market in China, but iResearch estimates that penetration rate will grow up to 55.5% in 2016. The market of mobile applications will continue to grow making this market one of the most attractive for global and European software providers.²⁴

5. Handy Games case study as a success story of European company on the Chinese social network services market

One of the European companies that succeeded to enter Chinese social network market is a German game developer²⁵ Handy Games. Their products, social games called Clouds & Sheep and Townsmen are applications designed for Android and iOS platforms, thus available for vast majority of smartphones and tablets in China. Both games are integrated with Chinese social services Sina Weibo and Tencent Weibo. Clouds & Sheep had been a top game in China's Apple Store for two weeks since launch, and Townsmen, reached the top ten paid downloads chart shortly after launch.²⁶ It is not clear how many Chinese users play German games, but Clouds & Sheep reached 250 thousand downloads on the Wandoujia.com website which is one of the major Android applications' distributor in China.²⁷ There is a lack of data about the number of downloads for iOS platform. Handy Games probably succeeded because they cooperated with Chinese partner Yodo1 and adopted the game for Chinese culture. Adjustments were especially visible in the game Clouds & Sheep (the game in which player has to raise and breed a flock of adorable cartoon sheep and try to keep them happy). The marketing target user group were young professional women aged 20–28. Recently Japanese fashion for being Kawaii (cute in English, 可爱 in Chinese) spread in this specific group of clients,²⁸ so the game's cuteness

²⁴ Y. Weiqing, *2012–2013 China Mobile Payment Report (Brief Edition)*, iResearch Consulting Group, Beijing 2013, p. 6.

²⁵ *About us*, Handy Games, <http://company.handy-games.com/index.php?action=about#.UXqAB-col9j4> (retrieved 24.04.2013).

²⁶ *Making Your iOS Game Succeed to China*, Inside Mobile Apps, Oct 5th, 2012, <http://www.insidemobileapps.com/2012/10/05/guest-post-making-your-ios-game-succeed-to-china/> (retrieved 24.04.2013).

²⁷ 云和绵羊: *Clouds & Sheep*, Wandoujia, <http://www.wandoujia.com/apps/com.hg.cloudsand-sheep> (retrieved 24.04.2013).

²⁸ T. Tadao, Dissemination of Japanese young fashion and culture to the world-enjoyable Japanese cute (kawaii) fashions spreading to the world and its meaning, *Sen-I Gakkaishi* 2010, vol. 66, no. 7, p. 223.

was emphasized in all its marketing material. Another cultural adaptation was careful translation with usage of Chinese internet slang which made the game fashionable.

The game also became popular because its adaptations for social networking. Players could share photos they took in the game (e.g. sheep wearing decorations), to show their friends on social services. Within a week after launch of the game, there were hundreds Clouds & Sheep photos on the Sina Weibo and Tencent Weibo. This created a viral growth mechanism, which contributed to the popularity of the game.²⁹ Cooperation with Chinese partner, cultural adaptation and social media utilization were the major factors which contributed to the success of Clouds & Sheep in the Chinese market. Handy Games is a good example of a European software producer that succeeds in the Chinese market. Therefore it proves that such success is possible.

6. Conclusions

Internet social services market in China is one of the biggest in the world. There are several Chinese companies that dominate this market leaving no space for foreign competition, which was successfully blocked from playing major role in China. Therefore, not creation of another social network service website can be considered as growth opportunity for European software developers, but usage of existing websites as platforms for various dedicated applications. In terms of revenues Chinese Internet market is one of the fastest growing in the world, and forecasts show that this dynamic growth will continue creating good growth opportunity for European software companies that would manage to enter that market. Analysis of global spending on mobile applications, Internet usage preferences and number of smartphones sold in China reveal that the market of applications connecting mobile phones with social services may be the most attractive for European software producers. Case study of Handy Games corporation and their mobile phone games that are dedicated for social network services proves that European companies can succeed in the Chinese market.

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²⁹ 3 *Ways Your Mobile Game Can Go Big in China – Lessons from HandyGames' Clouds & Sheep Launch*, Yodo1, October 11th, 2012, <http://www.yodo1.com/3-ways-your-mobile-game-can-go-big-in-china-lessons-from-handygames-clouds-sheep-launch> (retrieved 25.04.2013).

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ROZWÓJ INTERNETOWYCH SIECI SPOŁECZNOŚCIOWYCH W CHINACH JAKO MOŻLIWOŚĆ ROZWOJU DLA EUROPEJSKICH PRODUCENTÓW OPROGRAMOWANIA

Streszczenie: Internetowe serwisy społecznościowe zdobywają popularność na całym świecie, a producenci oprogramowania szukają możliwości rozwoju na tym rosnącym rynku. Celem niniejszego artykułu jest sprawdzenie, czy chiński rynek mediów społecznościowych może stać się celem udanej ekspansji dla europejskich producentów oprogramowania. Analiza struktury oraz danych dotyczących rynku mediów społecznościowych w Chinach wykazała, że jest to potencjalnie największy taki rynek na świecie. Dalsze analizy rynku pozwoliły na ustalenie, że największy potencjał wzrostu, ma sektor społecznościowych aplikacji na telefony komórkowe. Studium przypadku niemieckiej korporacji Handy Games i jej sukcesu na chińskim rynku mediów społecznościowych dowodzi, że ekspansja europejskich firm na ten rynek jest możliwa i daje duże możliwości rozwoju.

Słowa kluczowe: sieć społecznościowa, służba publiczna, chiński Internet, aplikacje na telefony komórkowe, producent oprogramowania.